DEVELOPMENT OF INFORMATION AND REFERRAL
SERVICES

GUIDELINES

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GUIDELINES

THE DEVELOPMENT AND STRUCTURE OF AN INFORMATION AND REFERRAL
SYSTEM
(AS A COMMUNITY RESOURCE FOR HUMAN NEEDS)
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Most literature concerning community resources simply provide a list
of resource and brief description of the function of agencies. There
seems to be a limited amount of literature which attempts to explain
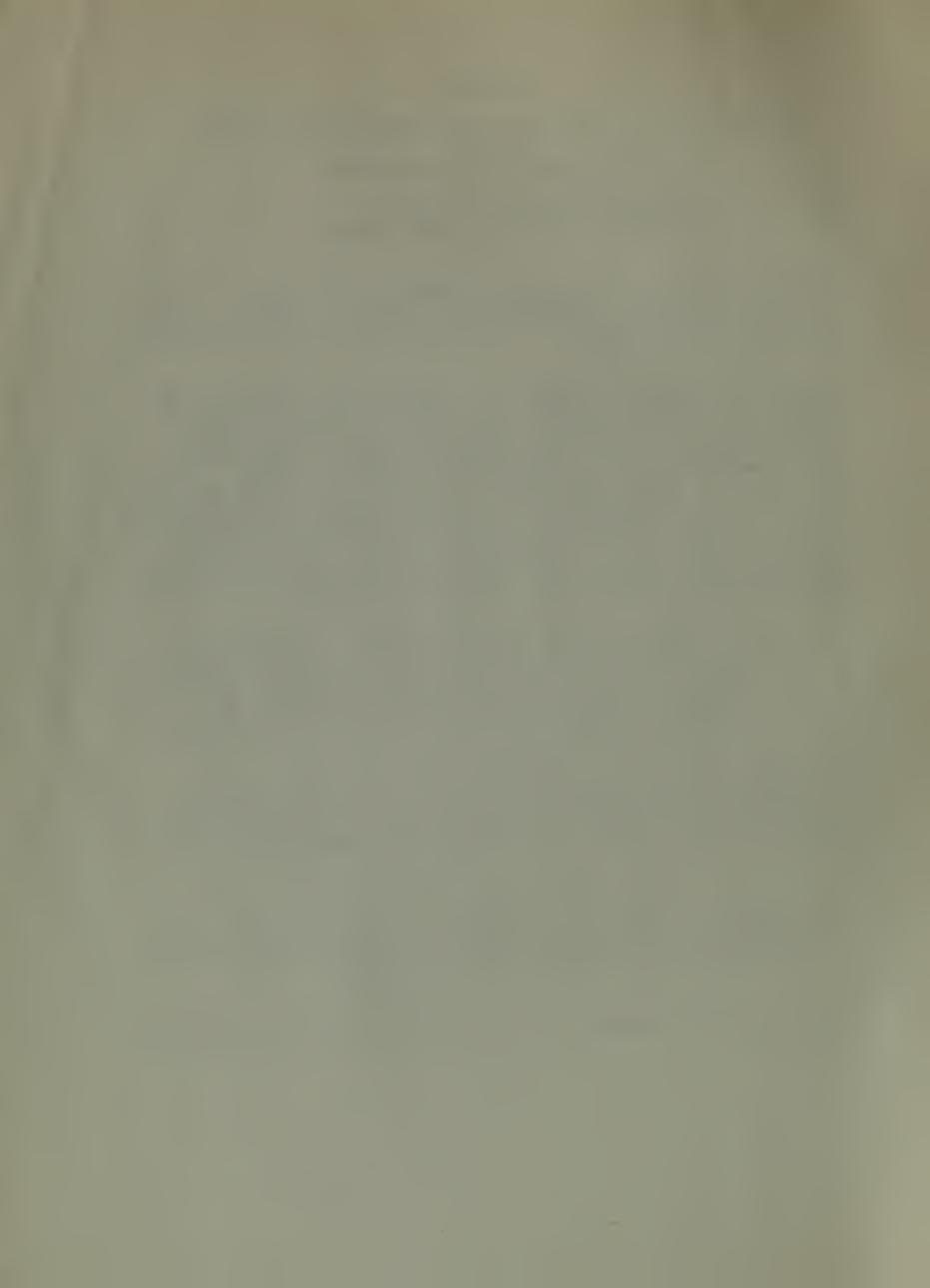the dynamics of resources.

A publication entitled, "Management of Organizational Behavior" (The
Utilization of Human Resources) by P. Hersey and K. H. Blanchard,
is based on the Human Resources rather than the Community Resource.
However it deals with the dynamics and psychology of human behavior
and the understanding of the personalities as a Human Resource. Per-
haps there is a lesson to be learned from the study of Human Resource.
That is what we commonly refer to as community resource should be human
resource. Because usually the quality of community resource is only
as good as the people who are responsible for the administration and
delivery of the services. The following quotation appears to support
the relationship between human and community resources:

> "the problem of today is not the things of environment
> but with the people. Man's greatest failure has been his
> inability to secure cooperation and understanding with others.
> Because of this situation it has also resulted in an
> unbalance which exists between Scientific-technical Skills
> and Social Skills." (1)

"Community Resources" is a common term used broadly in the field
of community organization and social services. The purpose of this
"Guideline" is to share with you what the term "community resource"
has become to mean to me in my experience with social services.

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(1) Management of Organizational Behavior (The Utilization of Human
    Resources) By P. Hersey and K. H. Blanchard (second edition) 1972
    Prentice-Hall, Inc. Englewood Cliffs, New Jersey

WHAT DO WE MEAN BY THE TERM RESOURCES?

Resources are any "available means" of obtaining public or private facilities, services, programs, manpower-skills, and existing information of interest which could possible be utilized to meet a human need.

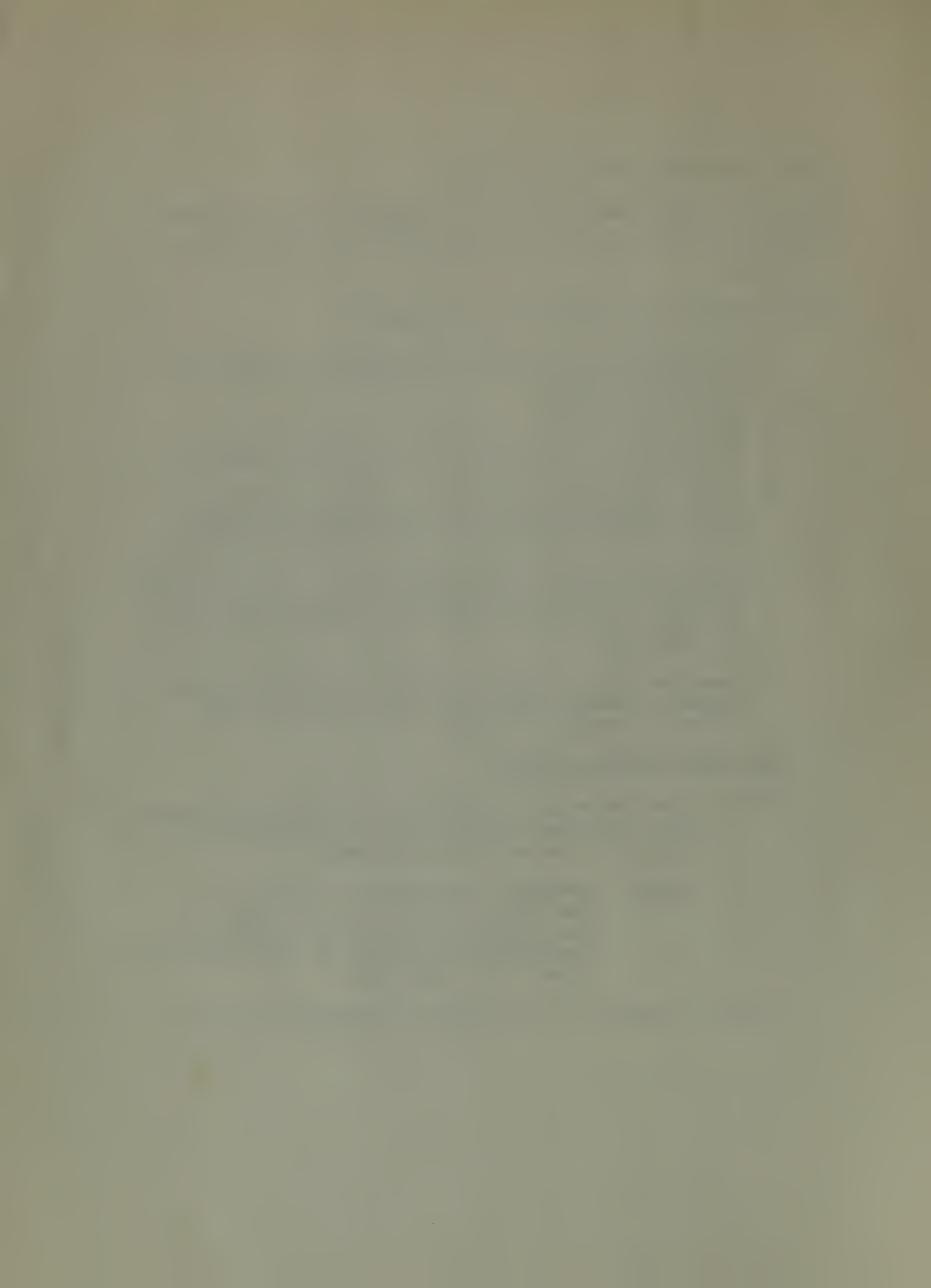WHAT ARE SOME OF THE DIFFERENT KIND OF RESOURCES?

1. Social Resources - services and programs provided by public or private organizations and people with special skills or volunteer manpower.

2. Natural-Environmental and Physical Resources - such as the geographic, monographic and demographic information.

3. Science and technical Resources -- medical, legal, business, computerized, expertise, consultation, training, education, statistical data, skills, research and planning.

4. Public Information and Referral Resource -- from literature, Publications, reports, directories, library, counselling services, verbal communication, conferences, workshops and the news media.

5. Human Resources - Protective Service, Out-Reach Program, "Person-to-Person" service and the direct delivery of service in response to a need.

HOW SHOULD RESOURCES BE USED?

FIRST: There should be a "classification-breakdown" of resource topic in various major and related sub-categories of interest for indentification purposes.

Example: EDUCATION -- EMPLOYMENT -- HOUSING -- TRANSPORTATION -- HEALTH -- WELFARE -- ETC. (See appendage for a list of suggestive classification-breakdown of topic resources and related sub-categories.)

SECOND: An awareness of the Primary and Secondary resources:

PRIMARY RESOURCES:

GOVERNMENT - All Federal, State and local Public facilities
and services available:

The Government in all levels has a major responsibility
for the people because of "Representation and Taxation".

The following is a quotation which explains the responsibility
of the Government:

"THOSE OF US WHO HOLD THE PRIVILEDGE OF PUBLIC OFFICE ARE
MERELY THE SERVANTS OF THE PEOPLE AND THE CUSTODIANS OF
PUBLIC TRUST. THE PEOPLE HAVE CLOAKED US WITH THE
AUTHORITY AND THE POWER TO REPRESENT THEM. THEY HAVE
THE RIGHT TO THE FULLEST MEASURE OF OUR ABILITY AND
GENUINE REPRESENTATION, THE PRACTICAL ENUNCIATION OF
THE HIGHEST IDEALS OF PUBLIC SERVICE, RENDERED WITHOUT
PARTISANSHIP, PERSONAL CONCERN OR EQUIVOCATION."

> John A. Volpe
> Governor of the
> Commonwealth of Massachusetts
> 1966

Some of the Government resource and facilities are listed in
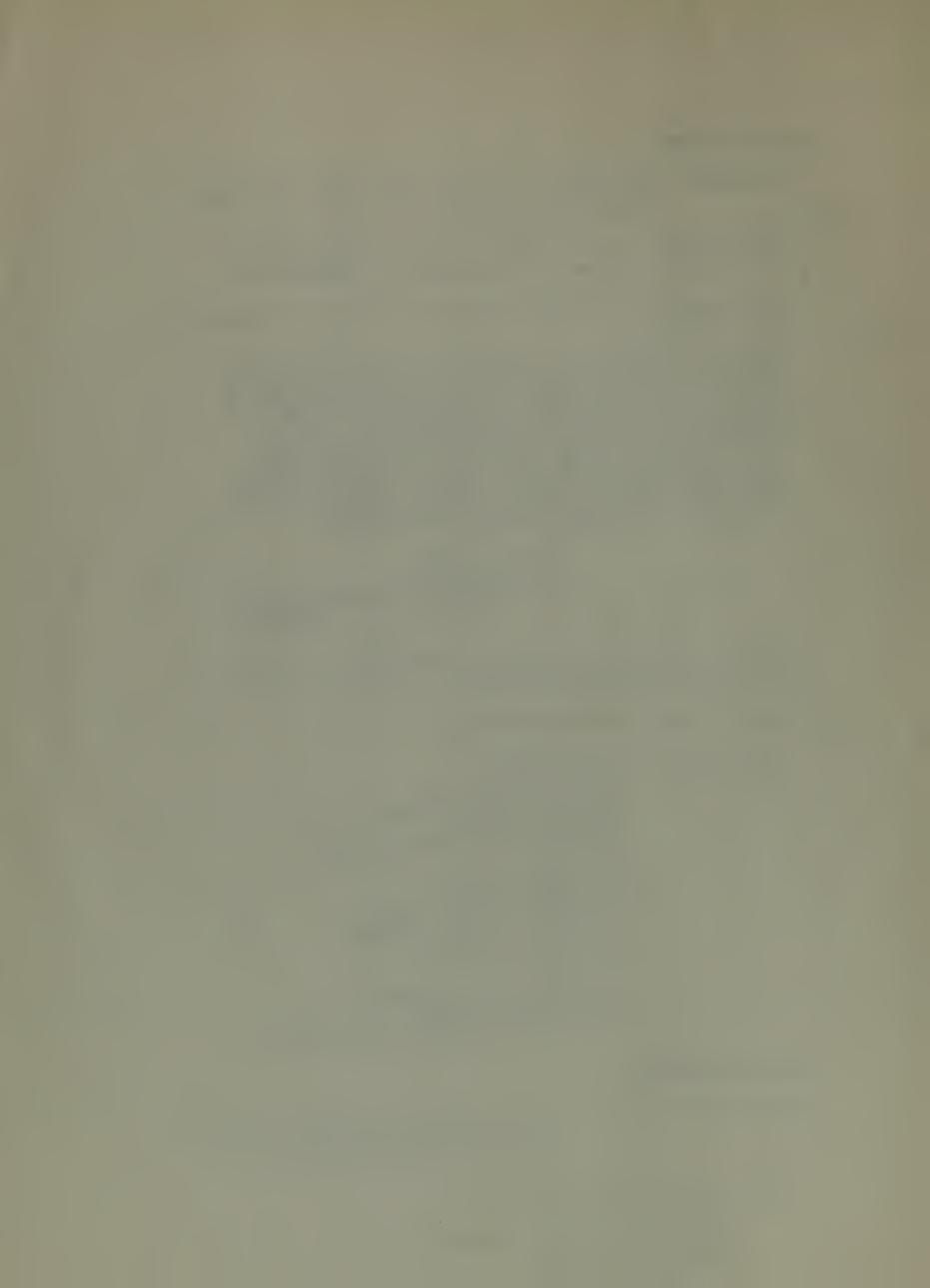most local telephone directories:

Example of Government Departments:

Department of - Public Health
Public Welfare
Attorney General Office
Consumer Council
Social Security Administration
Education
Employment Security
Commission for the Blind
Department of Elder Affairs
Parks and recreation
Utilities
Community Action Programs
Model Cities Programs
Urban and Redevelopment Programs, etc.

SECONDARY RESOURCES:

PRIVATE AND NON-PROFIT   Those facilities, services and programs
provided by Private and non-Profit
Organizations and Agencies such as:

The - Visiting Nurse Association
Family Services
Church and Religious Agencies
American Red Cross

Morgan Memorial
Salvation Army
United Community Services
Women's Education and Industrial Union, etc.

THE COMMITTMENT:

An attempt should be made to contact all of the Primary and Secondary resources of interest.

Telephone, visit or writing to the various facilities, organizations and agencies. Ask for their manual, directory, brochure or pamphlets explaining their purpose and functions. Also request that your name be placed on their mailing list for newsletters and/or bulletins. If an agency has a publication of interest ask for a complimentary copy or subscribe for it.

In a situation where a particular resource or services is of special interest or in demand a formal request should be made to obtain the name of an agency staff-representative as a direct source of contact as a liaison.

If possible get a verbal or written commitment of the Agency's willingness to provide a staff member for consultation or to attend, if necessary any "case disposition" - which might arise.
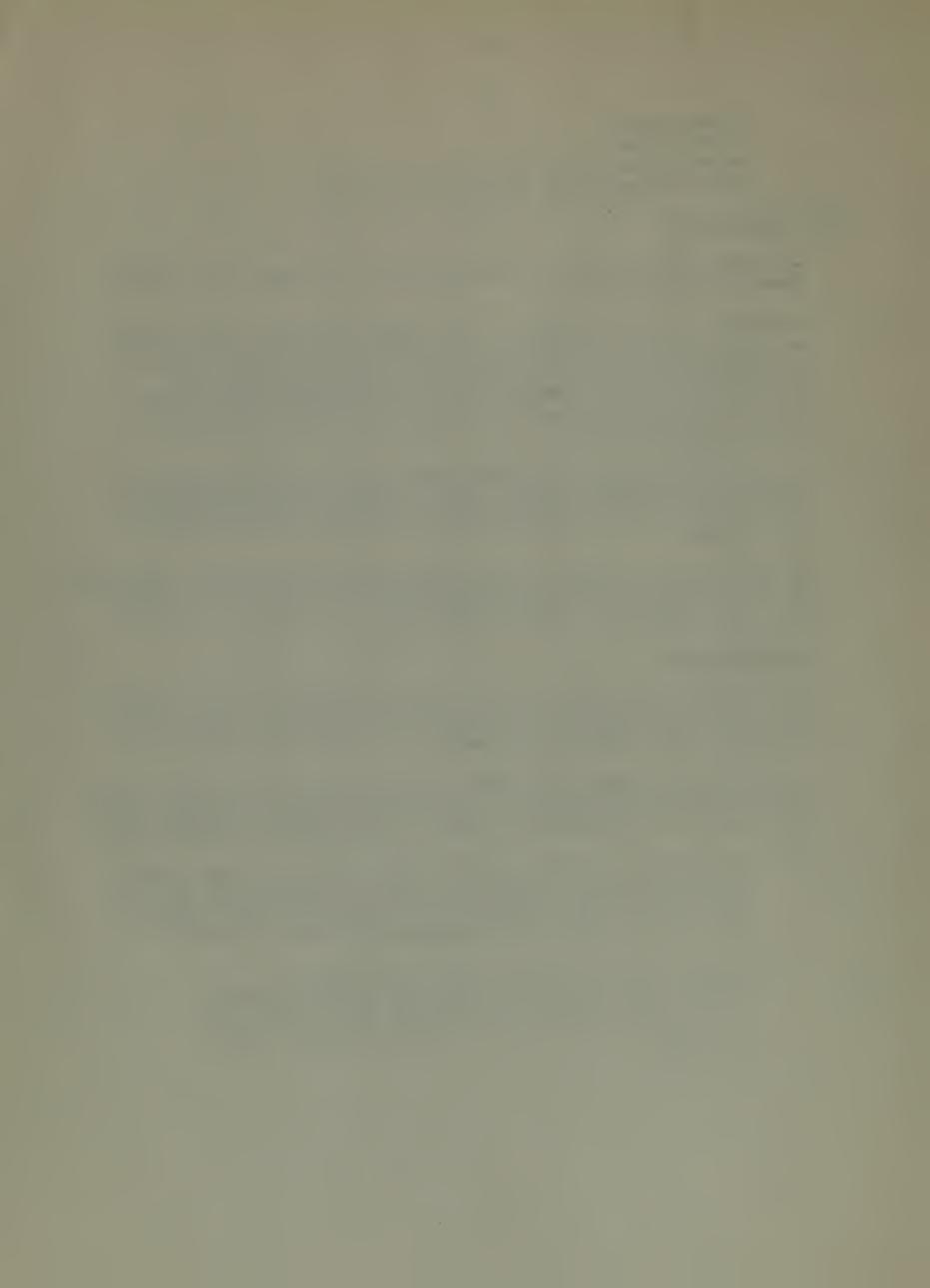
INTERPRETATION:

There should be made available some training program for those involved with the direct delivery of a service in the community, whether it be Information and Referral or otherwise.

An efficient and appropriate referral or delivery of service will depend on an accurate interpretation of a particular inquiry or problem. The following are some suggestions to help in the process of interpretation:

   (1) At the time of initial contact with a client an attempt should
        be made to clearly identify your agency and particular service.
        This will be of some indication to the inquirer as to whether
        they are in contact with the appropriate source for help.

   (2) Classify the category or nature of the inquiry.
       Example- Is the question related to Housing or Health?
       Is the caller asking for assistance with a nursing home
       placement; homecare service/ welfare or public health
       situation?

Assistance with a nursing home placement will require an evaluation
of the individual's financial and general living circumstances. Who
will pay for the Nursing Home Care? Is the individual a recipient of Old
Age Assistance? Will a local Homecare service and Visiting Nurse be
able to provide the necessary care so that the client will be able to
remain at home? Is comeone calling for the client? Is this what the
client has asked for or is someone making plans for the client?

(3)   Sometimes it is necessary to "identify" terms or labels for services
used by the caller. The caller might be confused about various types
of benefits such as Medical Assistance (Medicaid), Medicare, Medex
or Disability Assistance, Veterans Benefits, Veterans Services, Old
Age Survivor's Insurance (Social Security Administration), etc.

There are times when the attempt to clarify a service can become
involved especially when a caller does not wish to accept a parti-
cular label or policy of service.

Example:

Telephone Caller: Why was my Old Age Assistance check decreased
because of the twenty percent increase in the Social Security Benefits
(Old Age Survivors Insurance)? They have no right to do this! It has
nothing to do with Old Age Assistance!

Answer: Apparently the Social Security Increase affected your Old Age
Assistance Grant despite the special legislation to off-set the decrease by
allowing an additional $7.50 for personal needs and $5.00 for transportation
in your OAA Grant.

Caller: What $7.50 increase and what $5.00 for transportation? I have
never received that increase!

Answer: Both the Social Security Increase and the additional Old Age
Assistance allowance has been calculated in your monthly budget
making-up your grant.

Caller: What Budget?

Answer: The budget set-up by the Welfare after evaluating your financial
living circumstances.

Caller: Who is on Welfare? It is not Welfare! It is Old Age Assistance!

Answer: Old Age Assistance is one of the categories of Public Assistance
administered by the Departemnt of Public Welfare.

Caller: It is not Welfare! It is Old Age Assistance paid by revenue received from the State Meals Tax!

Answer: Well, let's not discuss the source of the revenue which is responsible for the OAA Progarm.

LooK at it this way -- OAA supplements your Social Security Benefit. It is the policy of the OAA Program to deduct any additional source of income which is supplemented to make=up your monthly grant.

Caller: They never told me about any budget!

Answer: Contaot your Welfare Worker and ask for a breakdown of your itemized monthly grant.

Caller: The Welfare Worker referred me to you!

Answer: It is the Welfare Worker who has access to your case-folder and the breakdown of your monthly budget which is the basis of your grant.

Caller: Well all-right! I am going to advise all of the elderly to refuse to pay their Massachusetts Meals Tax!!
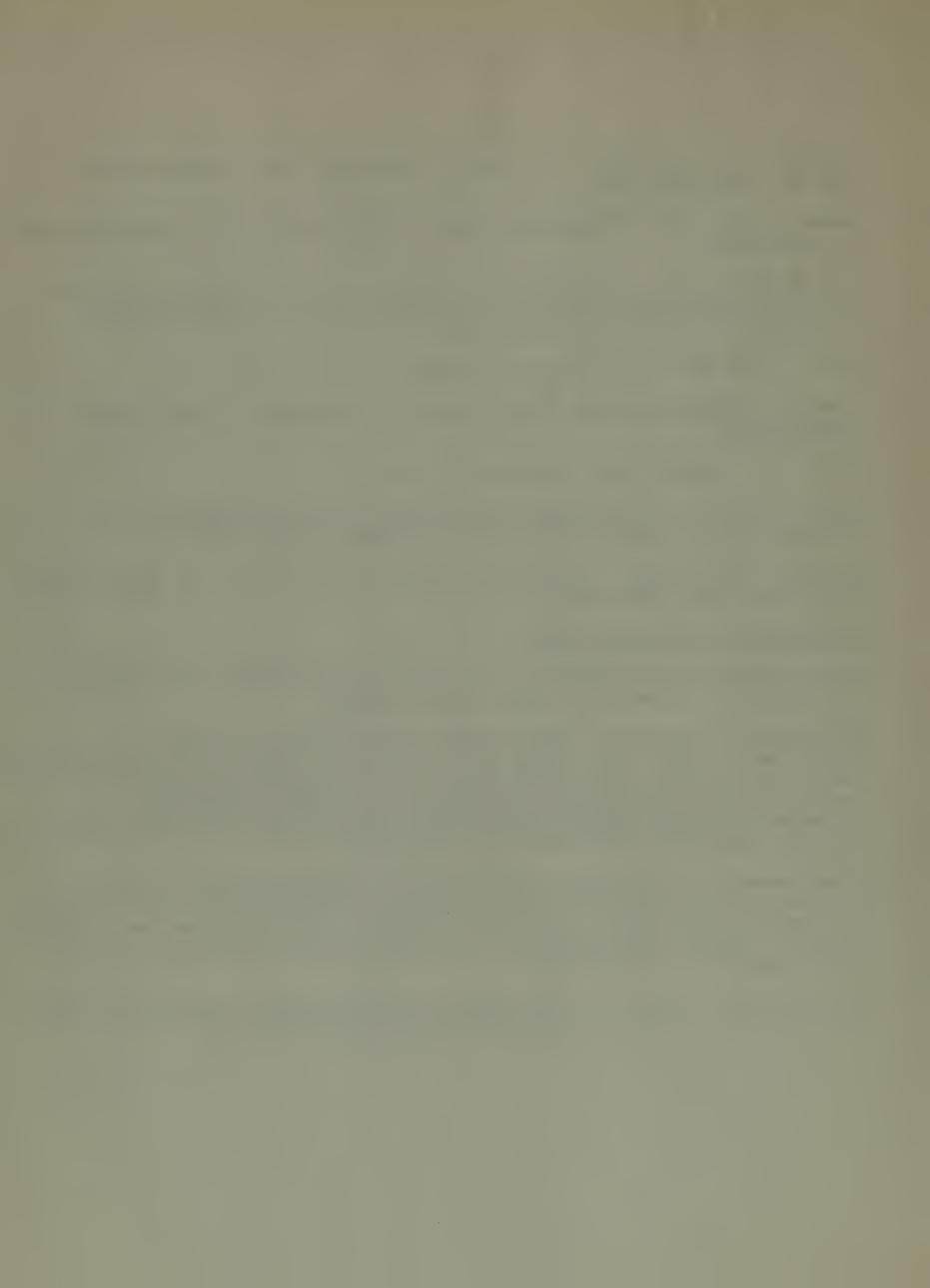
LIMITATIONS OF SERVICES AND ROLES:

People involved with the delivery of services should be aware of their roles, limitations of services and of other resource people.

Some community resource or service provide a direct "person-to=person" or hand-in-hand service. This kind of service is usually known as an "Out-Reach Program" which sometimes overlap with a Protective Service. The Out-Reach Program can include such help as in making-out applieations for Public Assistance or
    Medical Assistance; Nursing Home Placement; Pick-up Service for surplus food; Volunteer Transportation Service; Legal Advice, etc.

Other community resource people might provide a "Responding Service", such as a Referral and Public Information Service as does the "WBZ Call-for-Action" program. Some services are limited to the Agency's Office for consultation such as the United Community Services in some aspects, or available technical assistance only, such as the Department of Elder Affairs.

It is sometimes necessary to help agencies and individuals be realistic and acceptance of a lack of services whether it be in housing or otherwise.
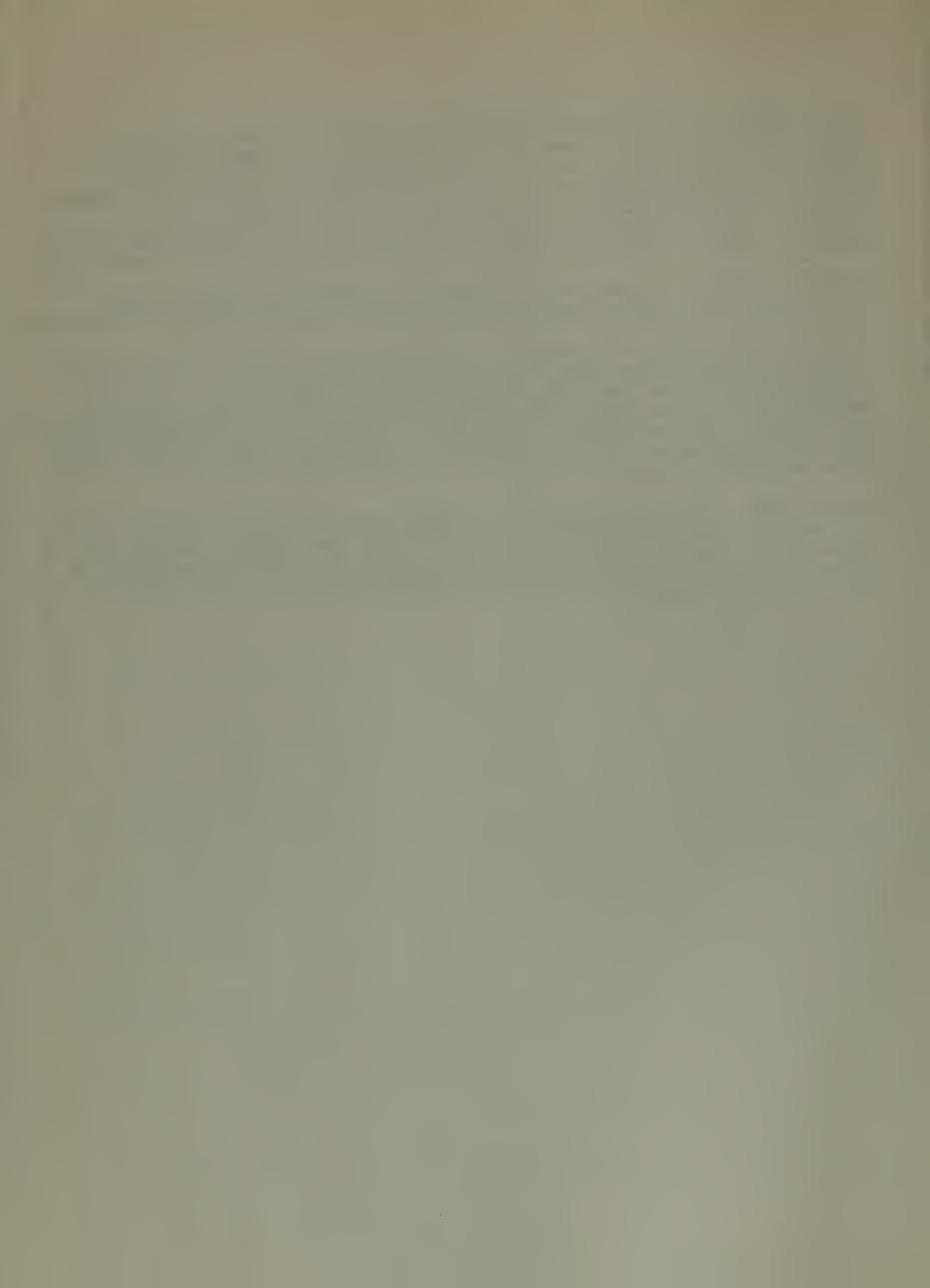
As an example-a caller stated emphatically, that the Department of Elder
Affairs has done absolutely nothing for the elderly handicapped and blind. In
answer it was necessary to help this blind man understand that the elderly
as a group have been neglected for years. The barrier has been broken. However
there is a lot of "catching-up" to be done. For example there is lack of
housing for all of the elderly in the state. When there is a lack of service in
general it makes no difference whether the elderly person is blind or handicapped.

At times it might seem some of the "callers" and "office visitors" are being
pacified when there are no service or facilites and resource to which to refer them

Some of the inquireres will refuse to accept the lack of service. They actually
"block" to the reply that there are no available housing vacancy, or list of
available nursing home placement, homecare service. Some will have you repeat
several times the same reply. Others will ask to speak to your supervisor or anoth
staff member. They will even try calling the office on the following day hoping
to speak with someone else as a "test" for the same reply, only to have the call
transferred back to you.

However most callers will accept the fact that there is a lack of service because
you have taken time to hear them out. If you make some realistic and sincere
suggestions as possible alternative action and give them some support and
encouragement most of the callers will be greatful just for the opportunity to
talk-it-out with someone.

THE DEVELOPMENT OF A RESOURCE DIRECTORY OR AN INFORMATION PAMPHLET:

(1) An attempt should be made to categorize various types
of services under major topics of interest or concern
such as: HOUSING: HEALTH: EDUCATION: EMPLOYMENT, etc.

(2) Make up a form letter or questionnaire (survey)
for mailing and/or for an office visit to as many
of the known local agencies and organizations pro-
viding a service concerning the elderly, under the
various categories of interest.

(3) One of the questions in the survey letter should
include the suggestion to indicate any other known
agency providing or including a service for the elderly.

(4) All of the information from the response to the survey
and general inquiry should be compiled categorically
for the information resource pamphlet.

Plans for preparing any kind of an information pamphlet will
depend on the amount of money, facilities and manpower avail-
able. One of the advantages of an information pamphlet is
the reaching-out to the community in general to those provi-
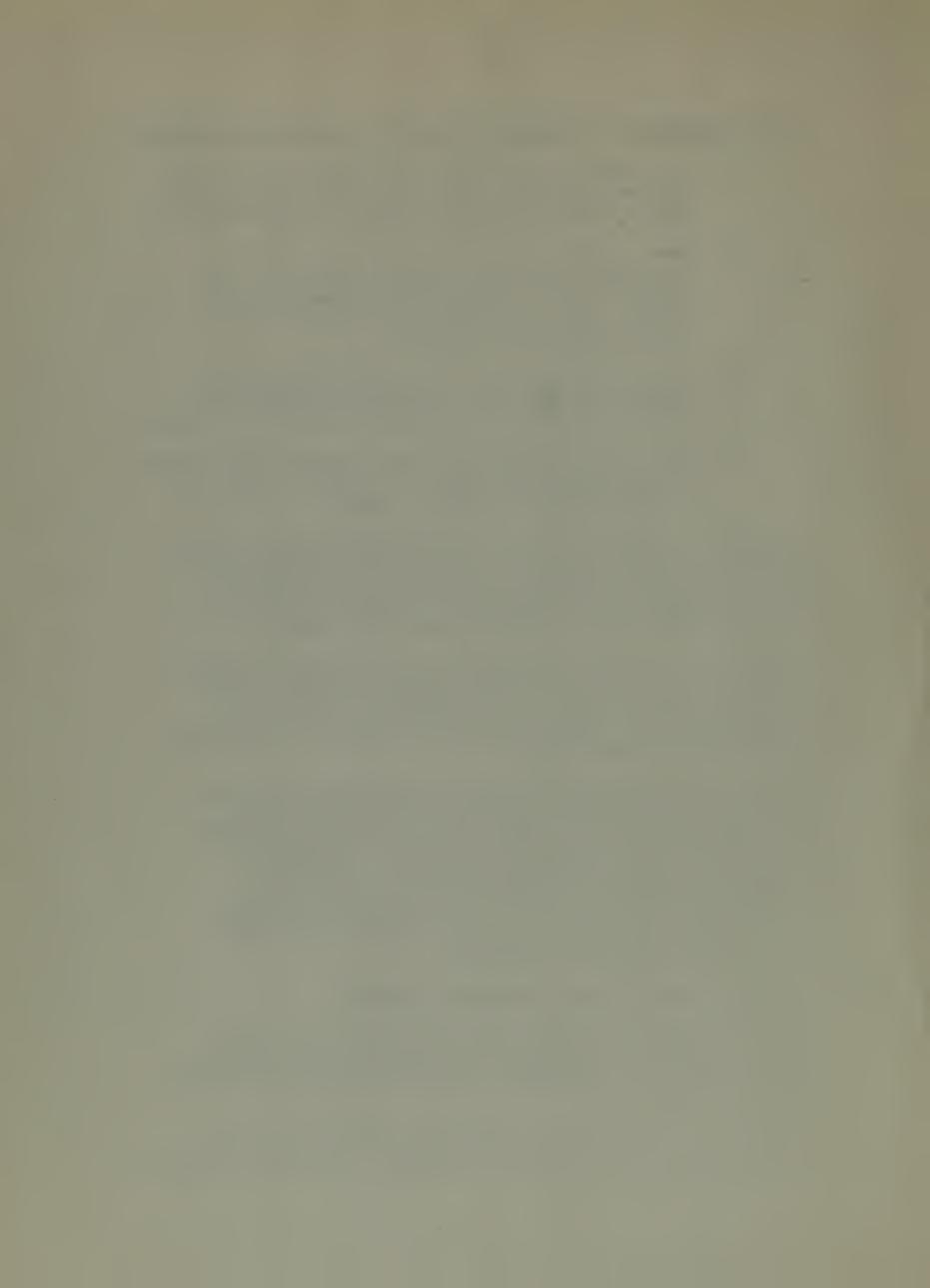ding the service and to those in need of the service.

There are also some disadvantages of an information pamphlet.
(Unless it is revised regularly it becomes out-dated. There
is also sometimes a need of interpretation of individual
problems so that a direct referral can be made for expediency
and for general counselling.

Therefore, whenever possible it is preferrable to provide a
local centralized source of personal information contact.
However an information pamphlet can be a start and substan-
tiate the need of a "Responding Service." In repeat for
emphasis the local telephone directories -- listings
under The Commonwealth of Massachusetts or United State
Government, City or Town of -- can be helpful in learning
of the Public Agencies that exist and which can be a lead
for information of their functions.

GENERAL THEORY CONCERNING ORGANIZED RESOURCES:

The following is a quotation from the October, 1972 (SRS)
Social Rehabilitation Service Information Exchange Bulletin,
published by U. S. Department of Health, Education and Welfare
Volume 1, Number 8:

"The maze of government is constantly changing and needs to
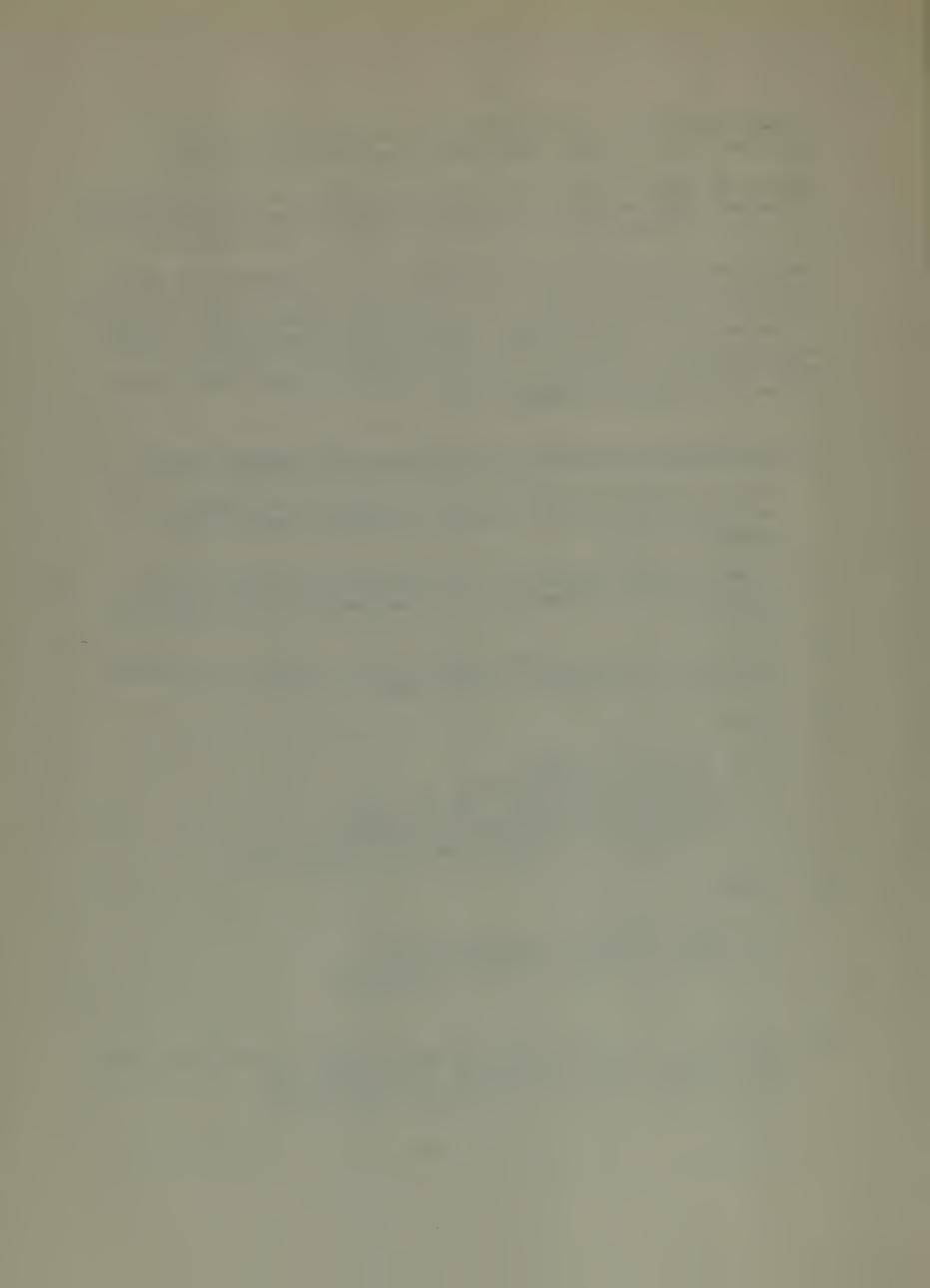be explained, interpreted, and clarified. This maze can become

an "Isolation Booth". The bureaucrat must guard himself against insulation from the people whose lives he so profoundly affects."

"Apparently there is a need of a system that will provide an opportunity for an individual or agency to contact a coordinated resource which looks at and tries to support all aspects of human living in a community."
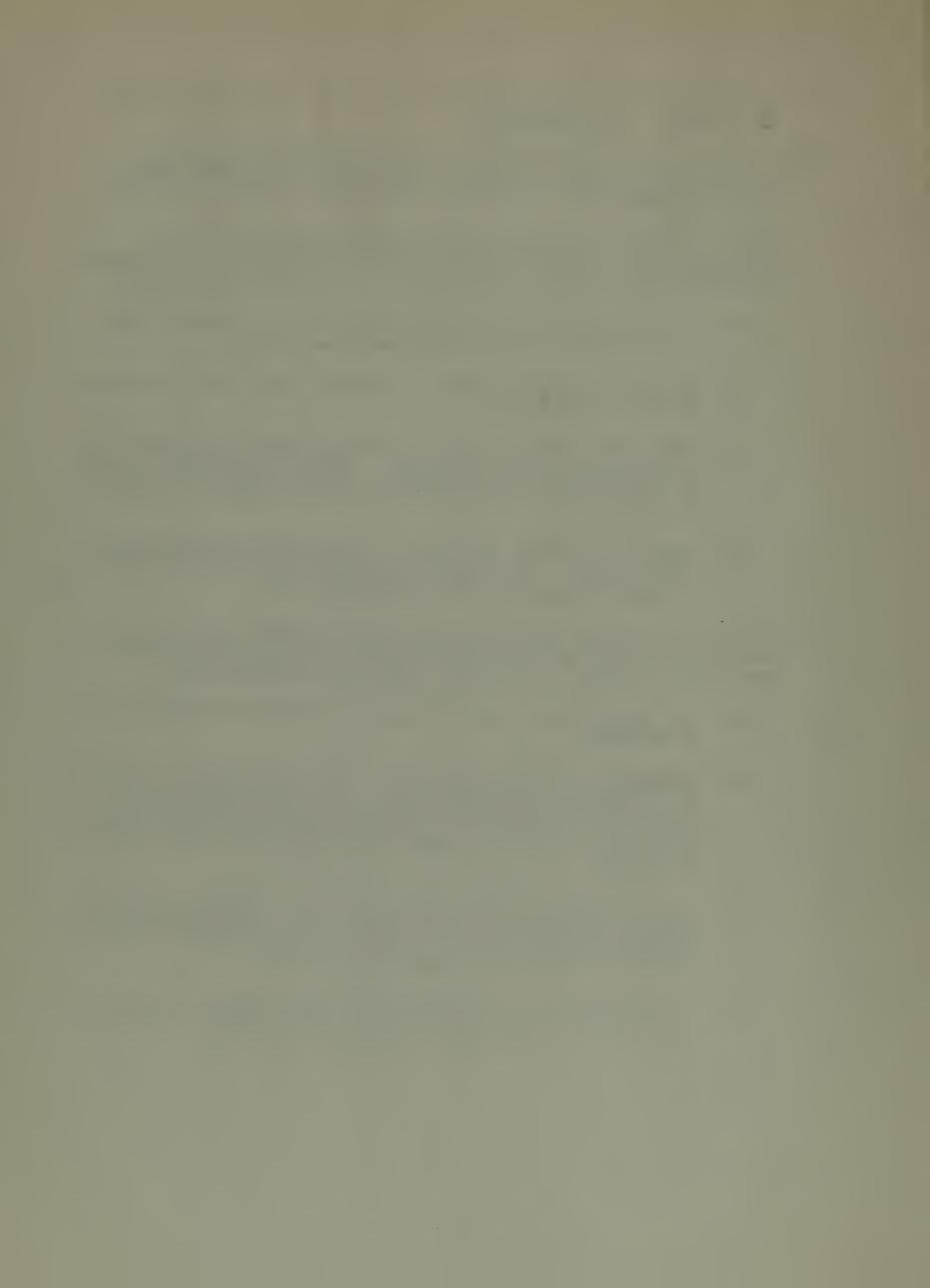
"An information and referral service network is one system which can be very helpful if not the answer as a "motivating force for cooperation and coordination among the health, social, welfare and educational resources in a community. It will provide a direct line of communication with the individual in relation to his needs and interests. It can help to expose the gaps in community resources and point the way to the improve= ment needed in specific services." (2)

THE STRUCTURE AND DEVELOPMENT OF AN INFORMATION AND REFERRAL SYSTEM:

I.   First -- there is a need for the improvement of the image of I & R as something more than a convenient "work-slot" and/or remote answering service.

II. Planned training program for I & R personnel and those concerned to develop some uniformity in the understanding of its purpose and function.

III. There should be an available listing of all existing I & R Services in the State for referral to other areas.

IV. Function of I & R:

     (1) In-service (Agency)
     (2) Public Service (Community)
     (3) Specialized (example - for the Aged)
     (4) Generalized (all categories of needs -
              example - The United Community Service, etc.)

V.   Purpose:

     (1) Social Service
      (2) Means of Contact (Responding Agent)
       (3) Community Resource (Public Information)

(2) Guidelines -- A professional Information Service for the Aged (paper)
     Sol S. Boskind, ACSW - Age Center of Worcester, Inc.
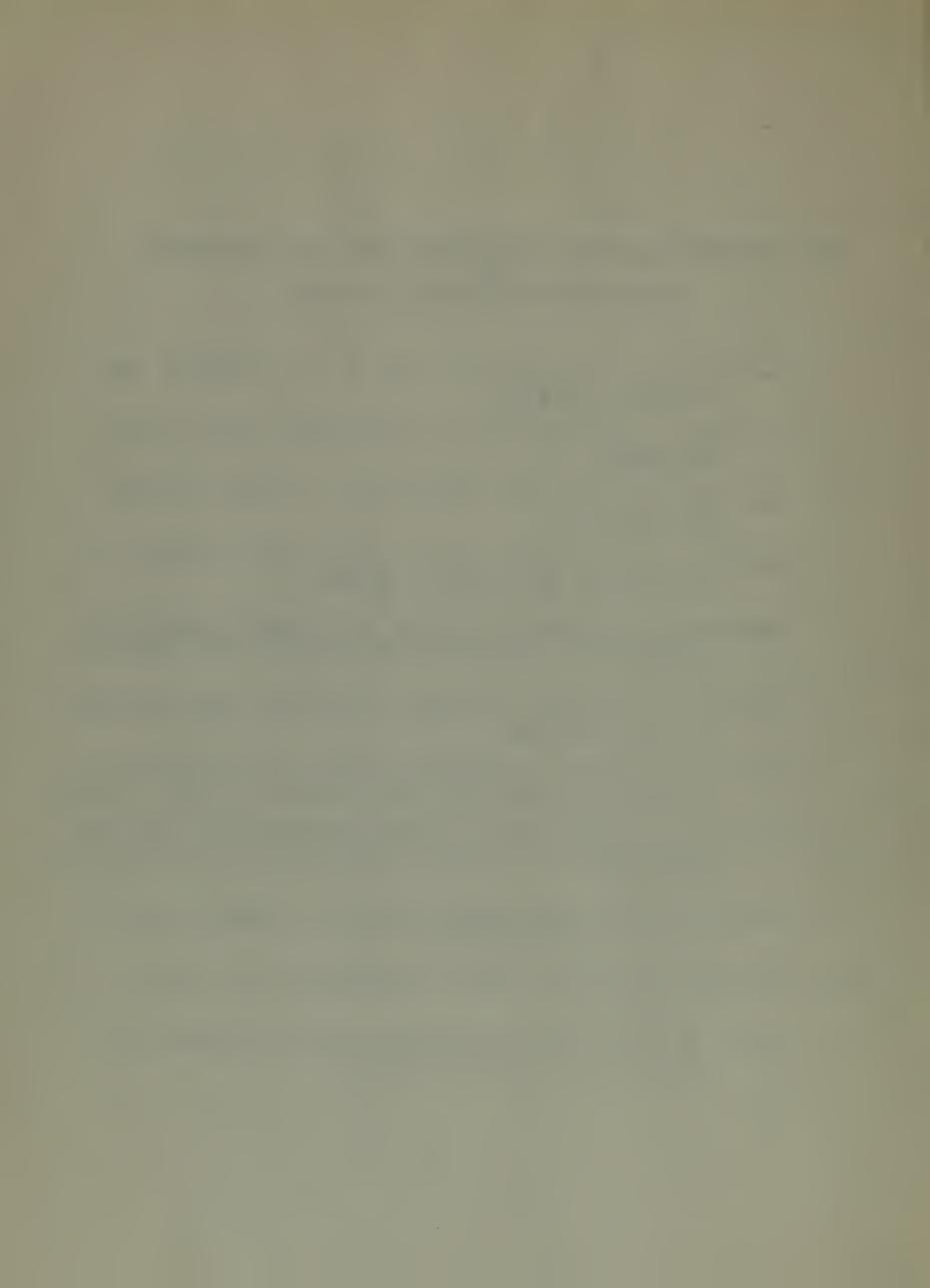   5 Main Street, Worcester, Massachusetts 01600 (1967)

VI. A general acceptable "definition" of I & R for all those concerned or involved. (See appendage)

VII. A general acceptable breakdown of the "over-lapping" <u>components</u> of I & R so as to make available a "PRELIMINARY DIAGNOSTIC SERVICE" in the community.

An I & R System can consist of any one or combination of the following components with a minimal of "over-lapping" or duplication with other local agencies providing one of the other components:

    (1) I & R Contact (As a "Responding Agent" - to link the client or agency with available service or resource.)

    (2) OUT-REACH SERVICE (Limited) - To assist the client with their "Right to be Informed."

    (3) COUNSELING SERVICE (Limited) - To facilitate the solution of any problem faced by the client. (Before the problem becomes so serious that the individual's current pattern of function is disrupted.)

    (4) PROTECTIVE SERVICE (Limited) - To serve as an overall preventive function. (A direct "person-to-person" help in solving an immediate problem during a crisis.)

VIII An eventual "Tie-in" of all the local I & R Services for a "coordinated" Statewide Network Information and Exchange System to help and work as a "Team" effort for a common cause to facilitate --

    (a) The elimination of duplication, gaps and/or any fragmentation of services.

    (b) Exchange of learning experience, communication and the pooling of information, literature, etc., and to participate in the coordination of services, development of a centralized clearing house of resource for general distribution and uniform quality of service.

    (c) An opportunity for all those concerned or involved to participate as a "Team" in the development of an "on-going" operation including contribution of committees to the "Feed-in" process, training programs, conferences and workshops.

    (d) A "Centralized I & R Administration" with community representation for a "Decentralized" delivery of service.

SOME IMPORTANT QUESTIONS FOR UNDERSTANDING THE DEVELOPMENT OF INFORMATION AND REFERRAL SERVICES

1. What are some of the potential uses of an information and referral services?

2. How large a geographic area and population center should it serve?

3. Whom should it serve (in terms of ages, diagnostic groups and public)?

4. What kind of organization should sponsor and/or finance an information and referral service?

5. What kind of preliminary planning and community support are needed before initiating an information and referral service?

6. What kind of personnel is needed to staff an information and referral service?

7. How can information on community services and resources be obtained, and how can this information be kept current?

8. How does an information and referral services make its existence known to the public and professional needing the service?

9. How much service and casework should an information and referral service provide?

10. What kind of records should an information and referral service keep?

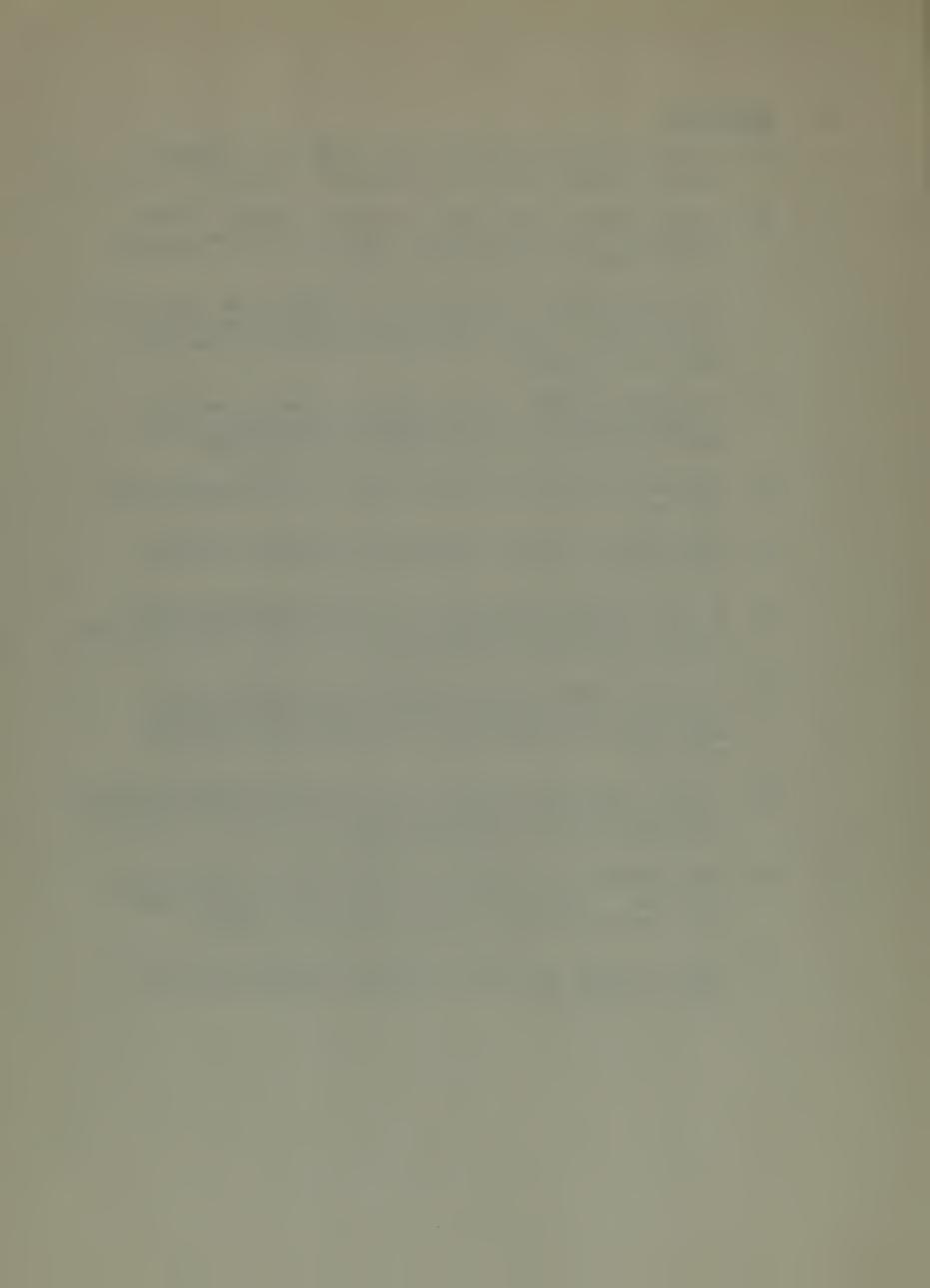11. How can an information and referral service stimulate the development of needed programs?

IX.   DEVELOPMENT:

(1)   An "On-Going" Resource File -- with folders for storage of
articles, reports, papers, bibliographies, listing of interest, etc.

(2)   A file folder for every major category of interest. Major
categories can be broken-down to several sub-topics depending
on the demand and information available.

The filing system can simply be in an alphabetical order. It is
not necessary to get "bogged" with a sophisticated or complex
filing process. There is a difference between a "Resource
File" and a "Library".

(3)   A Telephone Service -- direct line to a "contact person" as
a responding service. The telephone number should be well
publicized through local news media and/or bulletins.

(4)   A general directory of existing public or private agencies and
services.

(5)   Compilation of various information of interest for general
distribution.

(6)   A desk reference "Hand-Book" or 3 x 5 Card Index with file
box for "finger-tip" reference of the most used names, addresses,
telephone and resource in demand.

(7)   An Office library of general publications and books for
educational and training purposes for the staff, students
and/or public use depending on available funds, facilities
and space.

(8)   A Public Information Service -- to provide a general distribution
of literature and/or bulk publications of interest for meetings,
conferences and for individual request.

(9)   Record keeping forms appropriate for the kind of service and
case-load. This will facilitate data and statistical informa-
tion concerning nature of inquiry and area of demands.

(10) "Feed-in" System - should consist of a reliable means of infor-
mation supplied into the resource file especially for the
purpose of up=dating.

Suggestions:

(a) Assignment of a resource person for the responsibility
    for the organizing and up-keep of the resource file(s).

(b) Organize committees and/or sub-committees in the commun-
    ity to act as resource people and consultant or specia-
    list in various categories of interest. The resource
    people will be volunteers or employed representatives
    from other agencies. They will be responsible to contri-
    bute reports, papers, general literature, attend
    meetings, conferences, workshops related to the category
    or specific committee to "beef-up" the resource file.

(c) Subscribe to various bulletins, news letters of interest
    and a state newsclips service, etc.

(d) Utilize all available means, talent, techniques, personal
    influence and ingenuity to obtain all information and
    literature, especially of those topics of special interest
    which are in demand.

In conclusion, the Information and Referral System serves as a link
between the individual needs and the community resource.

The limitation of a resource file to the particular service being
rendered is perhaps the primary objective. However, whenever
circumstance will permit, it is advisable to develop a "sensitivity"
of a broad interest of other human services.

Sometimes other services and categories may serve to trigger new
ideas for the modification or expanding a resource and tapping another.

Actually to have a complete up-dated and on-going resource file on
every major category or topic will certainly be a difficult if not
an impossible task. It will require a large source of concentration
of manpower.

A complete and efficient Information and Referral System is not one
which has a centralized I & R Telephone Number, or a Central Clearing
House and a 24 Hour Service. Neither does a sophisticated areawide
directory or a computerized master code system make an I & R Service
complete.

"Remember, we are people - please do not fold, spindle or mutilate."

The most important factor for a successful operation and delivery of
Information and Referral service is an on-going "FEED-IN" process.
The contribution from specialist and the people involved or concerned
with human services on a local, State and Federal level.

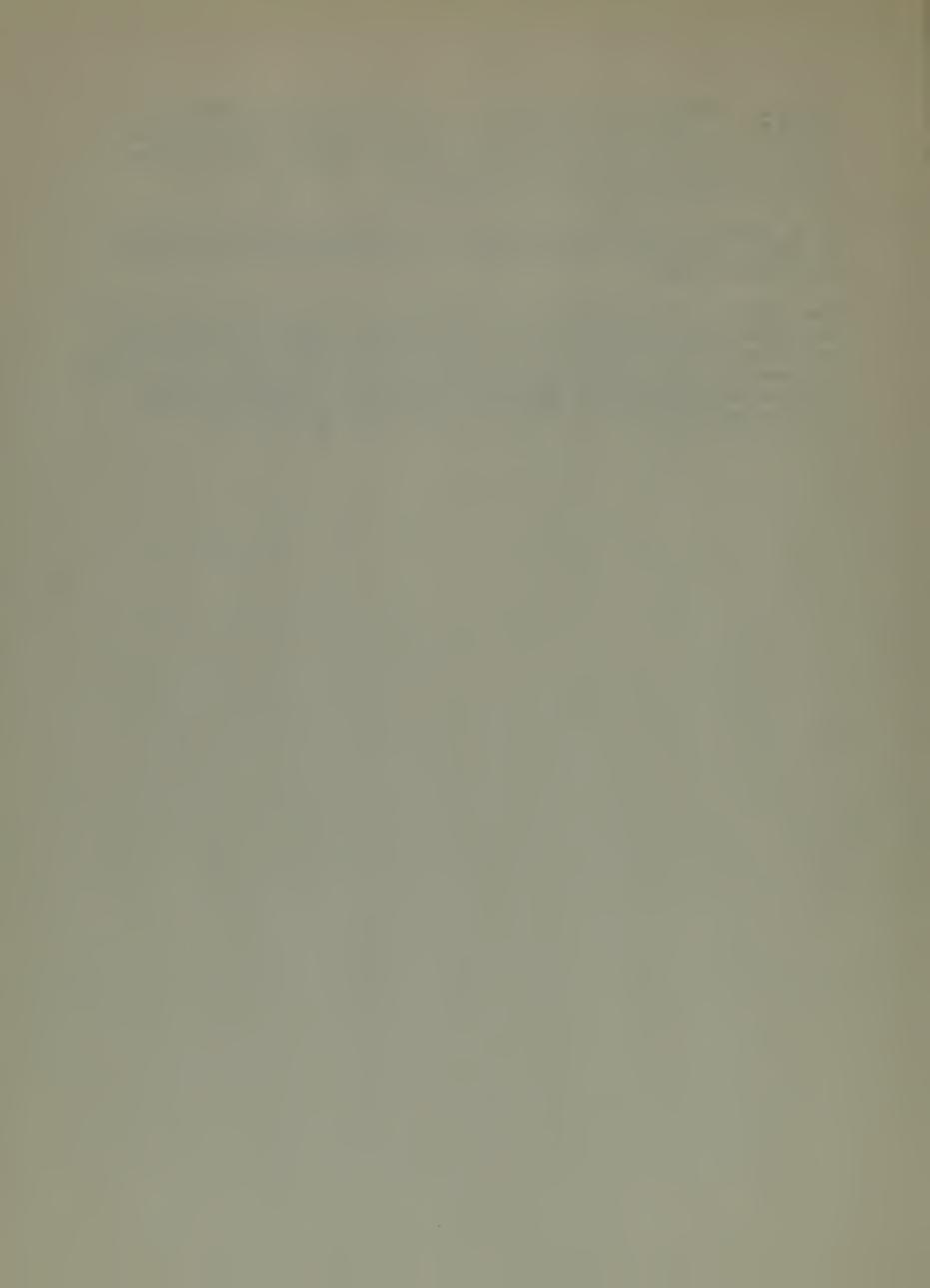A lack of "Teamwork" participation and contribution will result in a
tendency of witholding information, a gap of information especially on a
local level from public, private and community groups. This will also
result in a lack of acceptance or cooperation. There will also be
duplication and confusion to the consumer.

It is hoped that this paper will help set some consistency and awareness
of policy of operation and delivery of the Information and Referral Ser-
vices on all levels.

When there is a consistency for a standard of operation there will also be
acceptance and recognition of the I & R Service. When all the resources
and Information and Referral services are able to relate then there will be
a "Teamwork" effort which will be conducive for a "Tie-in" of all existing
I & R Services areawide or otherwise to make up an organized net-work
for a common cause of human services on any level or situation.

APPENDAGE

EXPLANATION OF FILE SYSTEM

IN USING RESOURCE FILE, SIMPLY "ASSOCIATE" THE SUBJECT OR TOPIC WITH
A RELATED CATEGORICAL FIELD OR MAJOR "TOPIC" SUCH AS:

> EDUCATION
> EMPLOYMENT
> HEALTH
> MEDICAL
> GOVERNMENT
> LEGISLATION
> ORGANIZATIONS
> SERVICES
> PROGRAMS
> CLUBS, CENTERS, COUNCILS, etc.

1) Major categories (topics) of interest are arranged alphabetically.

2) Each categorical file section will also include individual folders
   of related sub-topic(s).

   > Therefore, all literature for topics of interest
   > will be classified for filing in a related field
   > category or major topic such as "Health, Educa-
   > tion, Organizations", etc.

3) Each categorical file section will have an individual folder with
   any available bibliographies and/or general references of interest,
   listings and a cross reference sheet of possible related or sug-
   gested literature including general correspondence or memos.

4) Individual folders will have an on-going file card to replace folder
   when removed from the files. Date-out - date-in and signatures
   must be indicated when removing folder from the files.

5) Master copy of literature for xerox or otherwise will be marked with
   "I & R" on the upper left and right hand corners of paper. Master
   copies must be returned to files.

THE SAME BREAKDOWN OF MAJOR CATEGORICAL TOPICS AND RELATED SUB-TOPICS WILL
BE USED ON THE RESOURCE FILE-SHELVES FOR BULK LITERATURE AND PUBLICATIONS OR
MATERIAL FOR GENERAL PUBLIC DISTRIBUTION.

ANY SUGGESTIONS OR COMMENTS TO IMPROVE THE RESOURCE FILE AND INFORMATION
SYSTEM WILL BE WELCOMED.

MAJOR CATEGORIES AND SUB TOPICS SUGGESTED FOR INFORMATION AND REFERRAL RESOURCE FILE

AGING
    Bio-Psych-Sociological
       (Birth - Death)

CONFERENCES
    Reports (General)
    Brochures
    Speeches
    Workshops
    White House Conference on Aging
       (1960-65-71)
    Post White House Conference

DATA -- GENERAL INFORMATION
    City and Town Monographs
    Reports of Demographics Studies
    Statistics (of interest)
    Surveys (of interest)
    Questionnaires (copies - refer.)
    Directories (Local and general)
    Listings (Bibliographies, etc.)

DIRECTORIES
    Services - Programs
    Community Resources
    Listings (related)
    Agencies - Organizations
    Bibliographies (general)
    Out-of-State (samples)

EDUCATION AND TRAINING
    General Reference
    Library
    Adult Education
    Catalogues (Brochures)
    Films and Visual Aids - Vedo Tapes
    Workshops and Programs

GOVERNMENT
    City-Town-State-Federal
    Congressional Bulletin
    Legislation (bills-Acts)
    Senate-House of Repr.
    State Plan of Particular
       Agency or Program

EMPLOYMENT
    Job Placement
    Counseling
Empl. Projects
    General Reference
    Training (Gen.)
    Vocational

HOUSING
    GENERAL INFORMATION
    Local-State-MHFA
    Federal-HUD-FHS
    Supplement Rent
    Rent-Leased
    Mobile
    Condominiums
    Rent Board-Control
    Housing Court
    Tenant Management
Co Congregate
       (Sec. 207, Act of 1970)
    "Rent-Watch" Program

INCOME MAINTENANCE
    Consumer Education
    Taxes (General)
    Business
    Money and Banking
    Social Security Benefits
    Supplemental Security Income (SSI)

INDUSTRY AND LABOR - MANAGEMENT
    UNIONS
    Economy (Inflation)
    Business-Administration
    Interpersonal Relations
    Chamber of Commerce

RECREATION
    Leisure Time Activities
    Arts and Crafts
    Hobbies
    General Reference
    Physical
    Trips, Tours, Camps, etc.

HEALTH AND MEDICAL
    Public Health
    Medicaid (Medical Assistance)
    Medicare
    Health (General)
    Nutrition (Food Stamps - Meals)
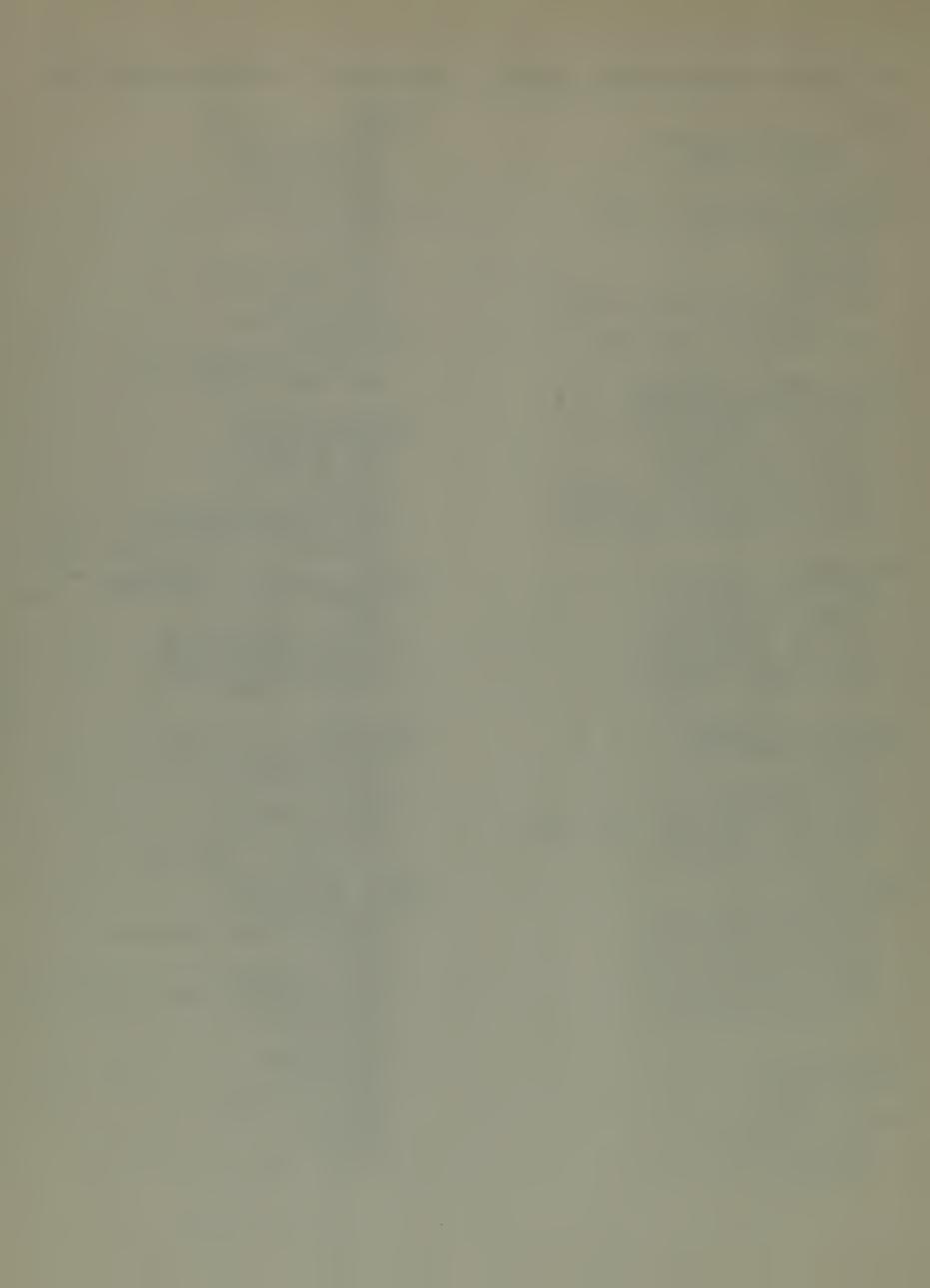   Rehabilitation
    Psychiatry
    Nursing Homes
    Flu-Shorts
    Screening Programs
    Homecare
    Homemaker
    Visiting Nurse Assoc.

PROGRAMS - SERVICES
    Projects
    Grants-Funds
    Community Centers, Clubs
    Friendly Visitors,
    Volunteer, etc.

ORGANIZATIONS AND AGENCIES
    Pamphlets-Brochures
    Listings (name and addresses)
    Public or Private (nonprofit)
    Health, Education and Welfare
            (U. S. Dept. of)
    Community Action Agency

RETIREMENT - PRERETIREMENT
    Philosophy and theory
    Planning
    Counseling
    Programs (related)
    Gerontology-Geriatrics
    Death (General Reference
                on Dying)
    Aging (General)
    Group-Work
    Advocacy

PUBLICATIONS
    Bibliography (ies)
    Newsletters, Newsclips
    Bulletins (General)
    General-Related
    Clubs-Centers-Councils
    Organizations-Agencies
    Out-of-State
    Local-State-Federal

SOCIAL SERVICES
    Related Agencies
    Organizations
    Public Welfare (Supplemental Security Income) SSI
    Public Health
    Private Programs
    Casework - Groupwork
        etc., etc.

RELIGION-CHURCH-SPIRITUAL
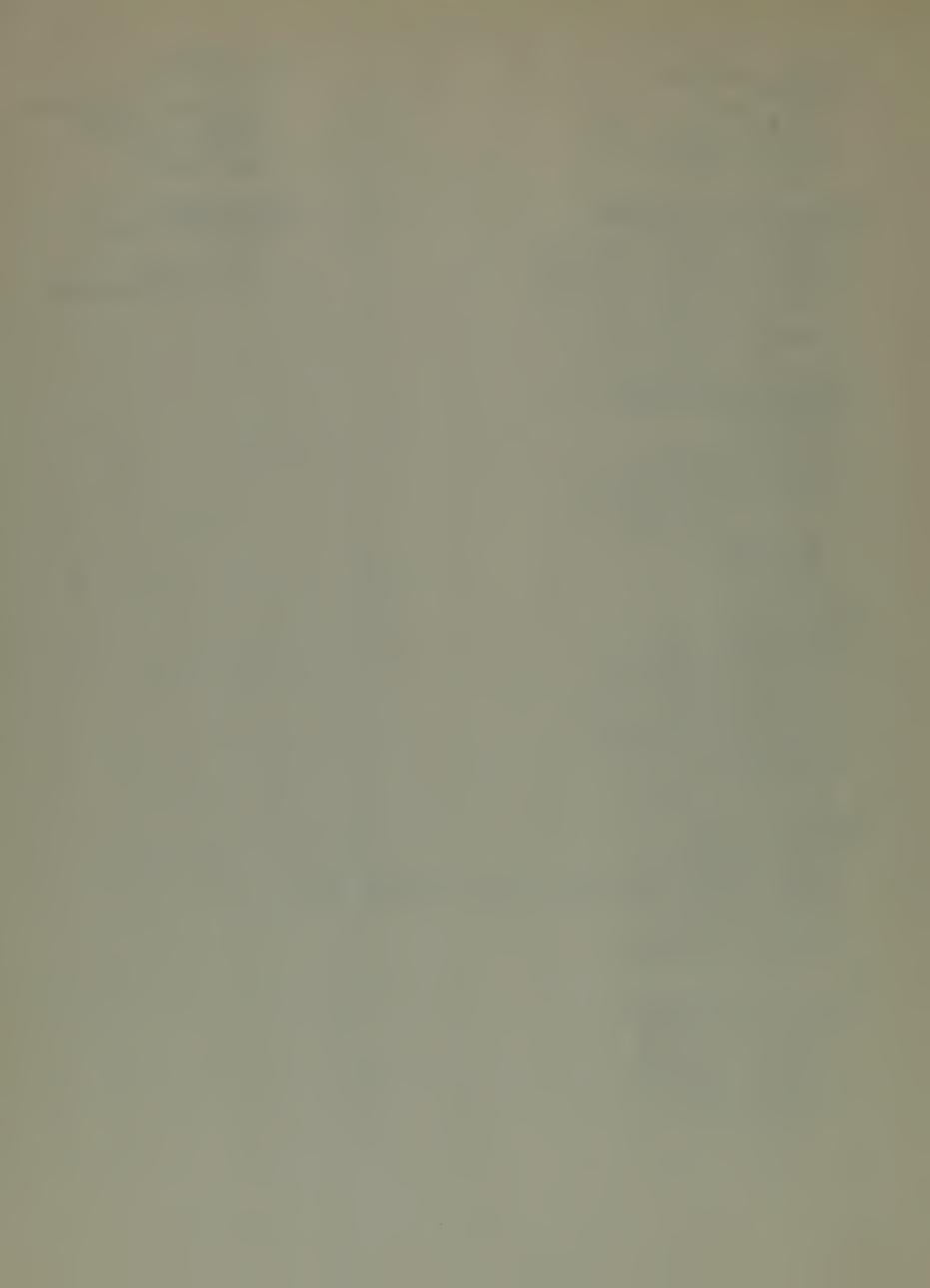   General References
    Community Services
    Pastoral Counseling
    Hospital-Home Visits
    FISH Program

LEGAL-ADVOCATES

    Para-Legal Assistants
    Probate - Wills
    Conservators
    Guardianship

TRANSPORTATION
    Statewide - Local
    Funds
    Reduced Rates
    Public-Private-Special

DEFINITION

INFORMATION AND REFERRAL SERVICES

In the context of services to the community, Information and Referral is a specialized program for people performed by a staff member to the extent determined by Agency Policy, its Internal Resources, and Community Resources available.

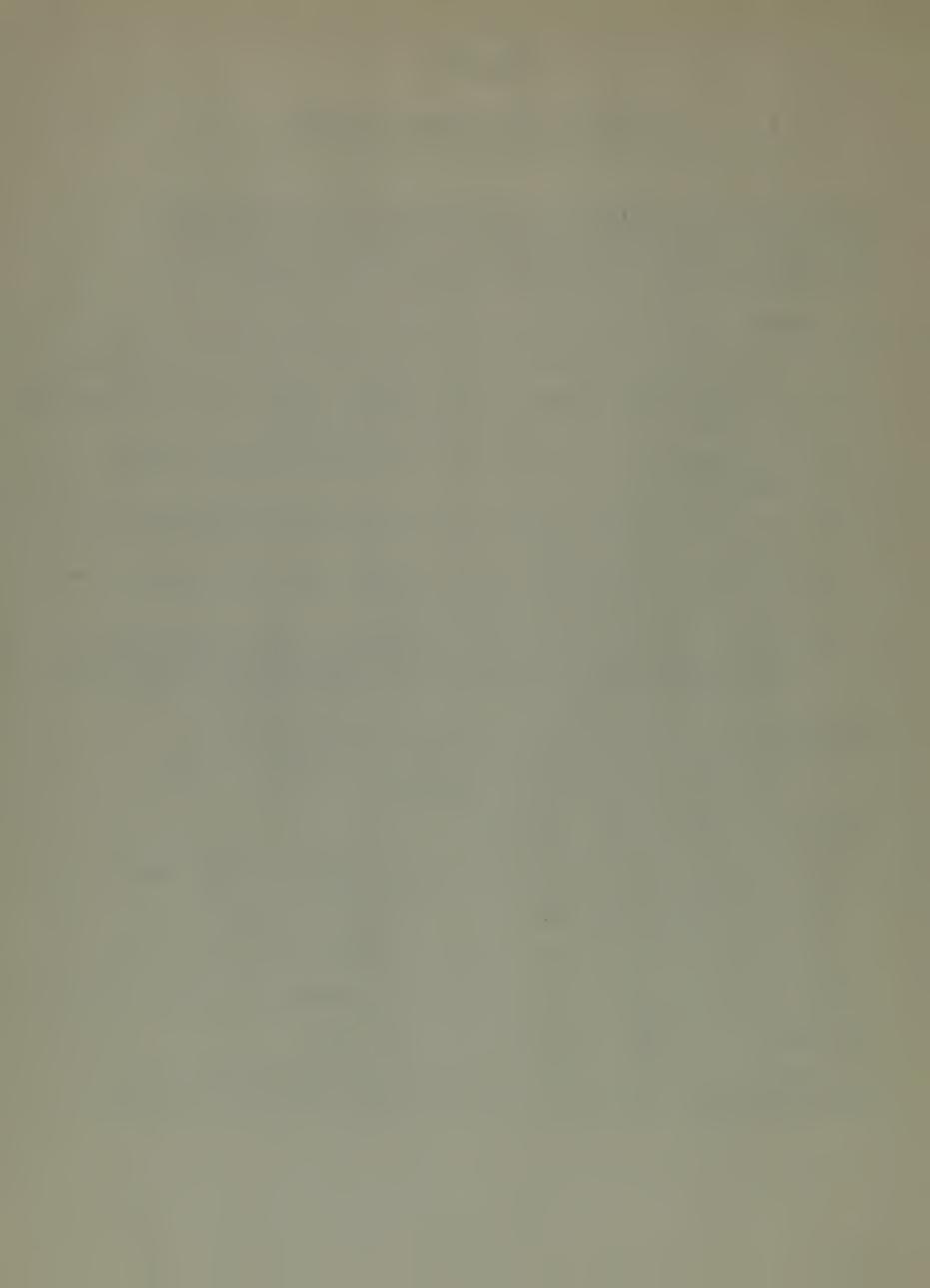The purpose of an Information and Referral Service are:

1. To make known and to be acquainted with Community Resources.

2. To facilitate the use of appropriate resources by interpreting the client and the resource and vice versa.

3. To coordinate services to the individual and with other agencies

4. To identify gaps in services and to mobilize resources to better fill such gaps.

5. To follow up Referral, and to assure that the client's need have been appropriately met.

6. To use collected data for evaluation of the program and to substantiate its effectiveness and justify the extension of existing and/or development of additional services.

The function of an Information and Referral Services is:

a. To screen the individual request in relation to the resources the agency can provide.

b. To identify the real need.

c. To relate the need to available resources. (Referral)

d. To interpret resources to the client's specific need.

e. To adequately record requests, Referral and follow up.

f. To create a plan for immediate and extend services.

(Developed by "Workshop Conference on I&R" 1967)

Sponsored by the Massachusetts Department of Public Health in conjunction with formerly the Massachusetts Commission on Aging.

JD/vm

GENERAL BIBLIOGRAPHY FOR THE DEVELOPMENT AND STRUCTURE OF AN INFORMATION AND REFERRAL SYSTEM

1. SERIES PREPARED BY THE INSTITUTE FOR INTERDISCIPLINARY
   STUDIES OF THE AMERICAN REHABILITATION FOUNDATION
   123 East Grant Street, Minneapolis, Minnesota:

   (1) NOTES FOR MANAGERS -- WORKING DRAFT
   (2) FOLLOW-UP   "   "
   (3) REFERRAL PROCEDURES   "   "
   (4) REACHING-OUT   "   "
   (5) THE RESOURCE FILE   "   "
   (6) INTERVIEWING AND INFORMATION GIVING-Working Draft
   (7) THE ROLE OF ADVOCACY (Working Draft)
   (8) VOLUNTEER ESCORT SERVICE "   "
   (9) A TRAINING SYLLABUS   "   "

2. WISCONSIN I & R NETWORK SERVICE NEWS (Free-mailing list)
   Published monthly by the Institute for Interdisciplinary
   Studies (IIS), and the Division on Aging, State of
   Wisconsin, Department of Health and Social Services
       Edited by Ed. Cartwright, Division on Aging
       I & R Project - Room 166, 55 No. Dickinson
       Madison, Wisconsin 53702

3. EASTER SEAL GUIDE TO ORGANIZATIONAL AND OPERATION OF
   INFORMATION AND FOLLOW UP PROGRAM. ($ 1.25) pre paid
           The National Easter Seal Society
           for Crippled Children and Adults
           2023 West Ogden Avenue - Chicago, Illinois 60612

4. GUIDELINES - A PROFESSIONAL INFORMATION AND REFERRAL
           SERVICES FOR THE AGED (Paper) 1967
               Sol S. Boskind, ACSW
               Age Center of Worcester, Inc.
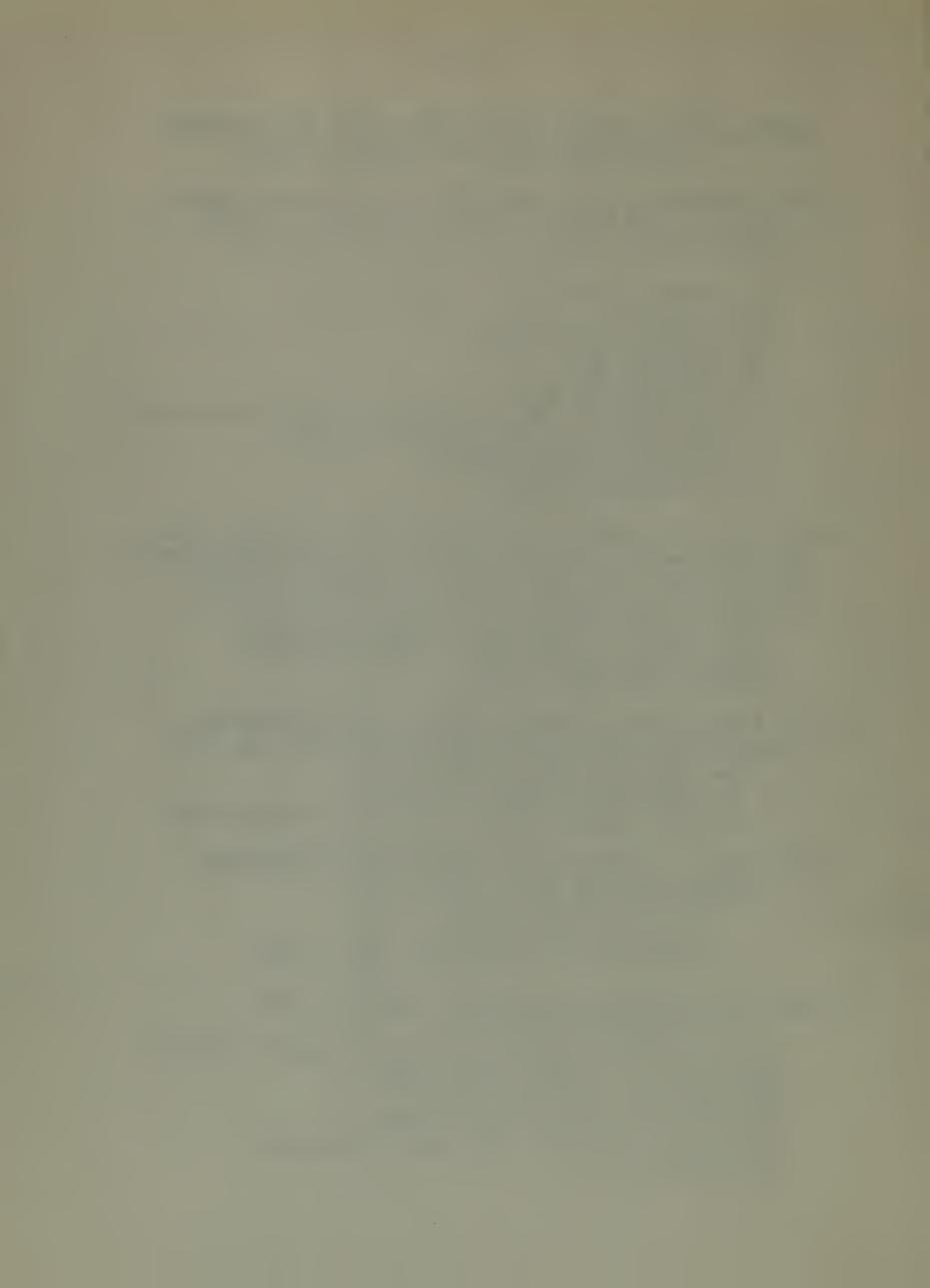   5 Main Street, Worcester, Mass. 01600

5. GUIDE TO INFORMATION CENTERS FOR WORKERS IN THE
           SOCIAL SERVICES (1971)
       John E. Muthard--Hurk B. Rogers and Linda M. Crocker
       University of Florida (NOv. 1971)
       Research Grant (22-P-55144/4-02)
       Social and Rehabilitation Service
       Department of Health, Education and Welfare
       Washington, D. C.

6. **GUIDELINES FOR A REGIONAL AND/OR STATEWIDE NETWORK**
   OF INFORMATION AND REFERRAL EXCHANGE SERVICES
   FOR OLDER AMERICANS

   (Paper - Including an I & R Job Description - sample)

   John P. Di Pirro, Information and Referral Services
   Massachusetts Department of Elder Affairs
   120 Boylston Street
   Boston, Massachusetts 02116

7. MANAGEMENT OF ORGANIZATIONAL BEHAVIOR
   (The Utilization of Human Resources - Second Edition $9.00)
   By P. Hersey -- Prentice-Hall, Inc. New Jersey, 1972

8. GUIDELINES FOR AN INFORMATION AND COUNSELING SERVICES
   FOR OLDER PERSONS

   Center for the Study of Aging and Human Development
   Duke University ($2,00 per copy)
   The Information and Counseling Service for Older
   Persons
   Box 2914, Duke University Medical Center
   Durham, North Carolina 27706

9. INTERSTUDY (Reports and Publications of Wisconsin I & R Network)

   Information and Referral Center Study
   123 East Grant Street
   Minneapolis, Minnesota 55403 Tel. (612) 338-8761

   Dr. Nicholas Long, Director

10. The AIR NEWSLETTER

    Alliance of Information and Referral Services
    1515 East Osborn Road
    Phoenic, Arizona 85014

    Membership and Subscription:
    Individual Membership ($10.00 per yr.)
    Agency Membership ($25.00 per yr.)
    Non-member subscriptions ($5.oo per yr.)

    P.O. Box 612
    Seabrook, Maryland 20801

    Editorial Correspondence:
    Editor, AIRS Newsletter
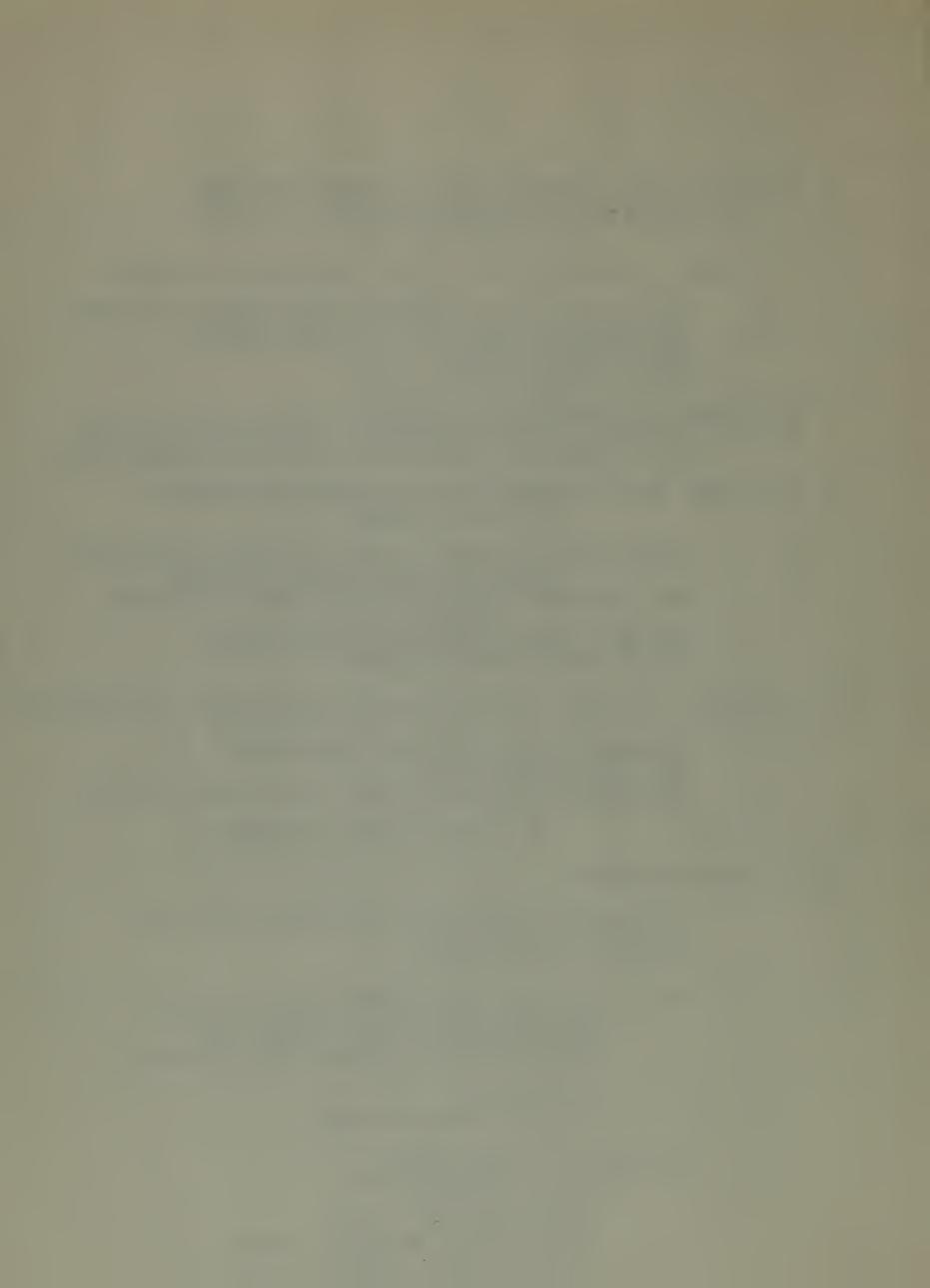   c/o InterStudy
    Nicholas Long, editor
    Ellie Bolch, Managing editor
    123 East Grant Street
    Minneapolis, Minnesota 55403

BIBLIOGAPHY (continue)

NATIONAL CLEARINGHOUSE ON AGING

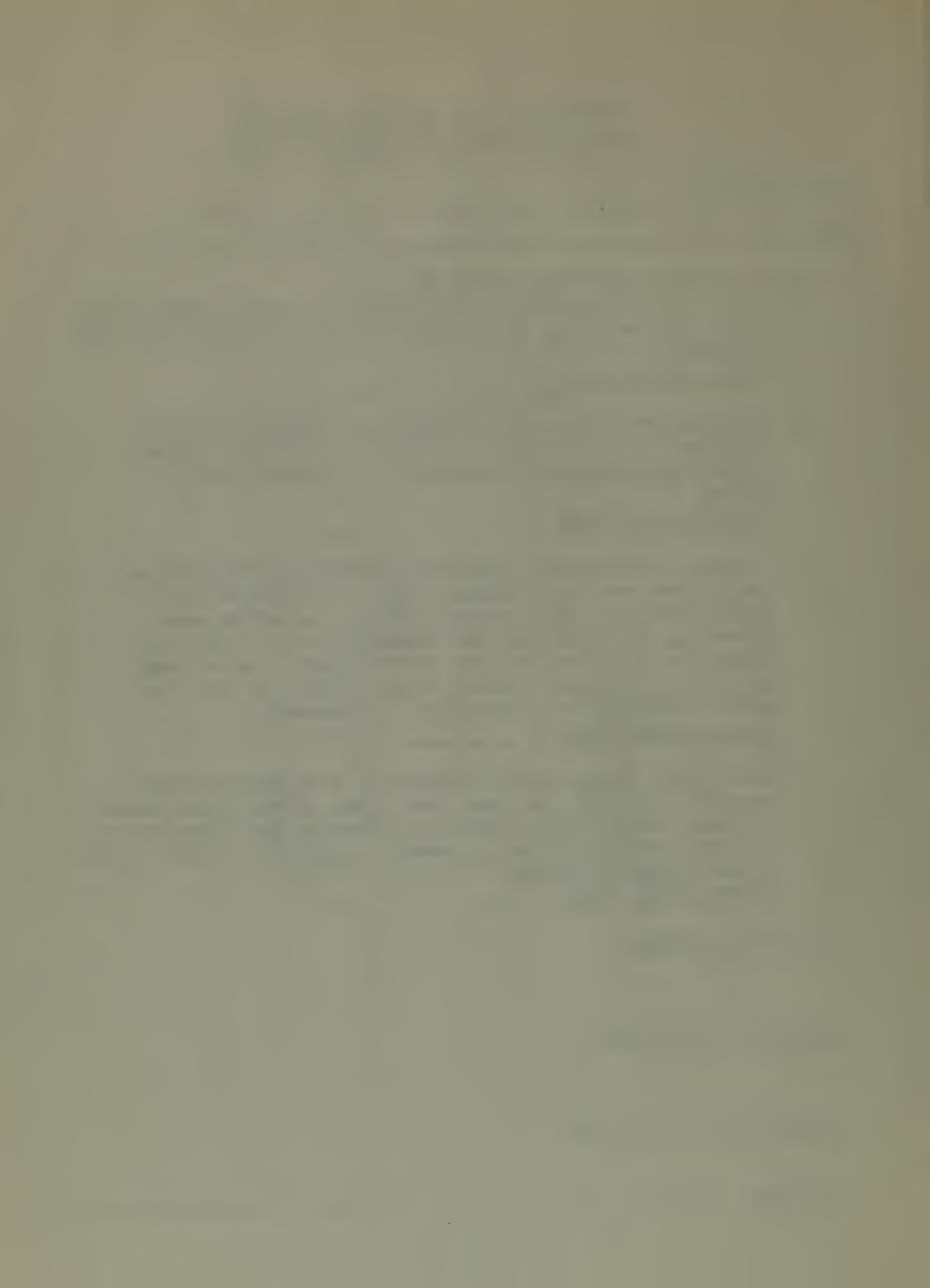   Dr. Clark Tibbitts, Director
          U.S. Dept. of Health, Education and Welfare
          Office of the Secretary
          Office of Human Development
          Administration on Aging

INFORMATION AND REFERRAL SERVICES
EXECUTIVE OFFICE OF ELDER AFFAIRS

WEEKLY REPORT:

NAME: _____ DATE: _____

1. MAJOR BUSINESS CONDUCTED DURING THE WEEK:
   a. Reply to correspondence and telephone inquiry concerning programs, services and general information involving the elderly.
      (Approximate time -- _____)

   b. Mail general literature concerning listing of clubs, centers, local Councils on Aging in reply to request and/or supplementary to inquiry for general inform-ation.
      (Approximate time --_____)

   c. Sorting, filing and scanning of incoming publications and literature as possible source of "FEED-IN" of in-information for the resource file. Including some planning, organization and compiliation of useful in-formation for distribution upon request. An attempt is made to prepare advance master copies of material most frequently or "seasonally" requested.
      (Approximate time -- _____)

   d. Brief discussions and/consultation with various staff members from time to time concerning community programs, services and general issues of interest for planning or dealing with the elderly, centers, agencies or public and private organizations.
      (Approximate time --_____)

2. MEETINGS ATTENDED:

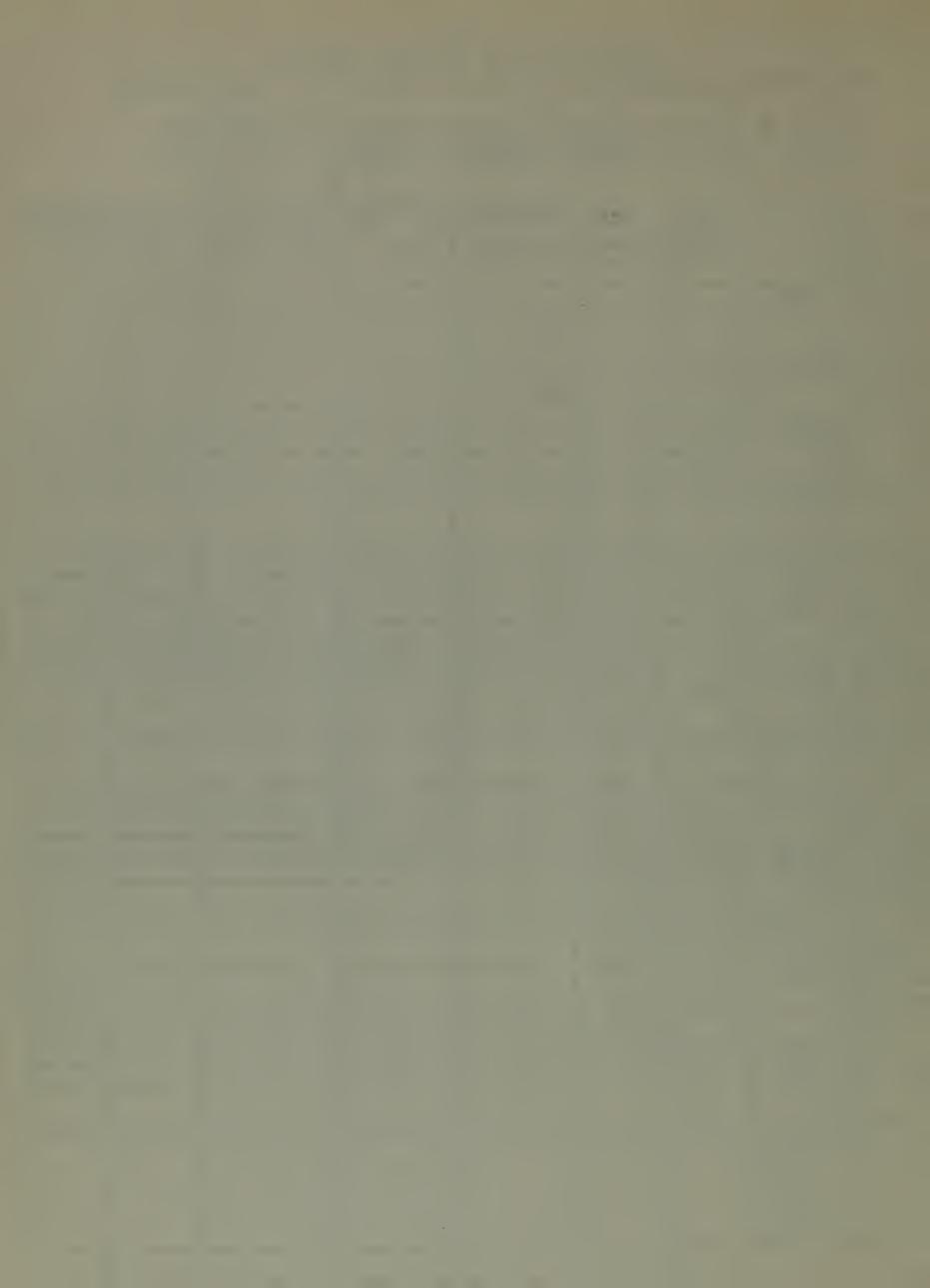3. PROBLEMS ENCOUNTERED:

4. SUGGESTIONS FOR ACTION:

5. COMMENTS: (Absence, clearance for attendance of conferences, etc.)

INFORMATION AND REFERRAL SERVICES
MASSACHUSETTS EXECUTIVE OFFICE OF ELDER AFFAIRS - AGING BUREAU

RECORD OF INQUIRY-REFERRALS AND DISTRIBUTION OF LITERATURE
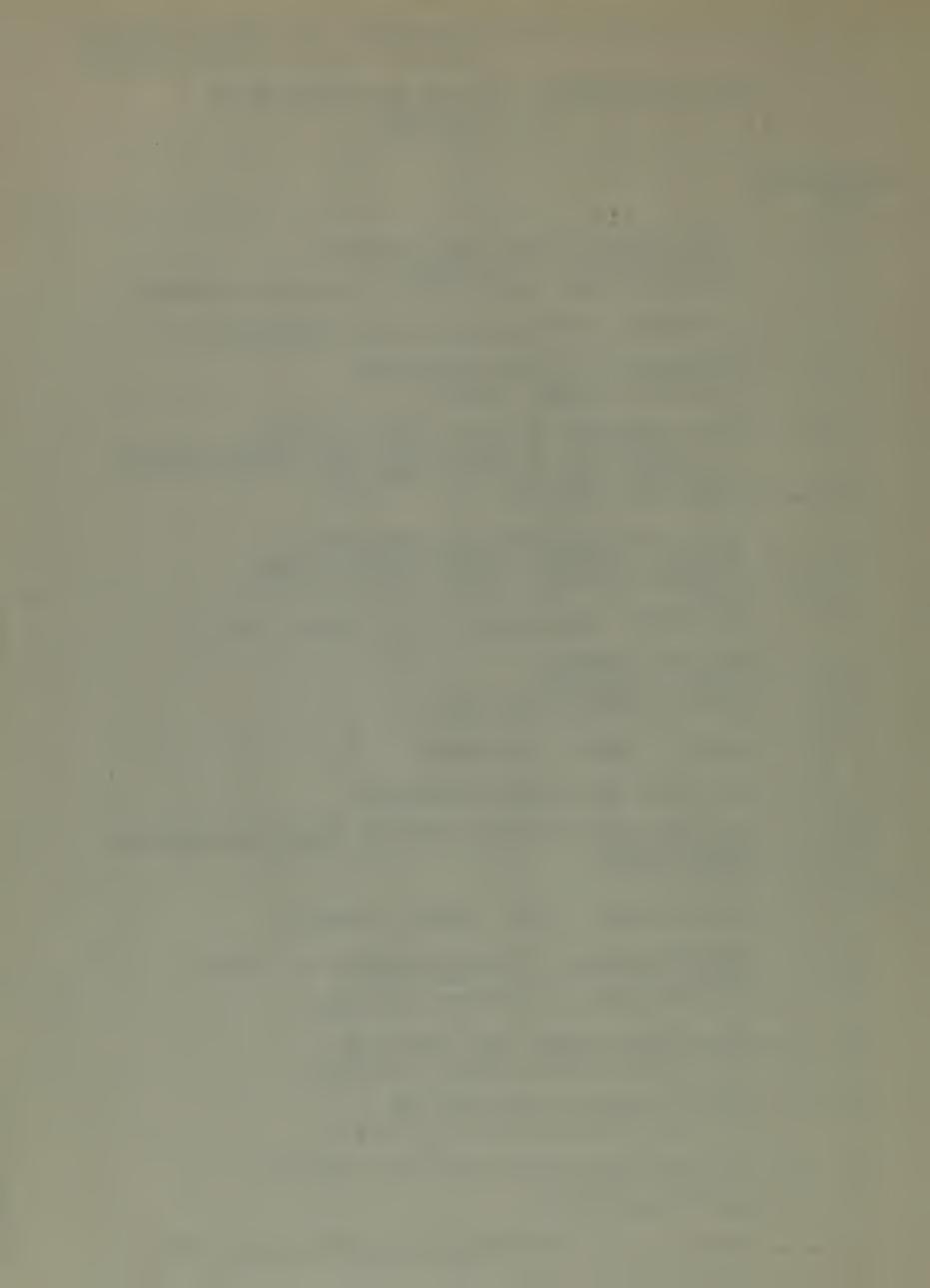(DAILY - WEEKLY - MONTHLY SCHEDULE ---DATE: _____)

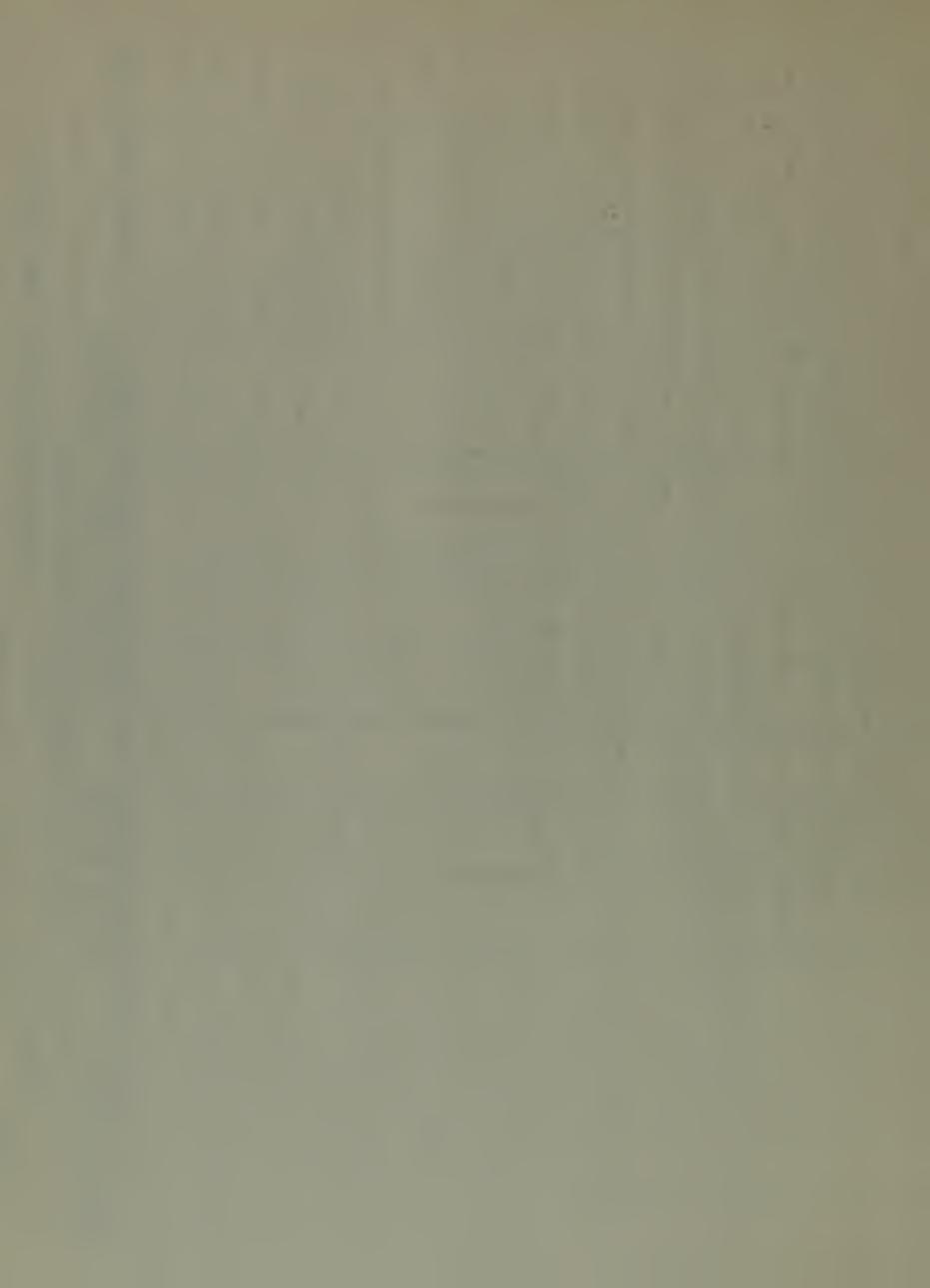| CATEGORY OF INQUIRY	TEL. IN-OUT	MAIL IN-OUT	STUDENTS RESEARCH	MEM. OF STAFF	LOCAL CTRS. CLBS. ORGAN.	OUT-OF STATE	OFFICE VI. I.
RECREATION							
TRAINING-RECR.							
HOUSING: NUR.-RES.							
FOSTER-BOARD							
DAY CARE							
MOBILE Hms.							
APTS. GENERAL							
INF. & REF.							
PRE-RETIREMENT							
DEV. OF CLUBS CENTERS-COUNCILS							
TRANSPORTATION							
MEALS-LUNCHEON							
NUTRITION INFO.							
ID CARDS							
GRANTS-FUNDS							
PROGRAMS-SERV.							
PUBLICATIONS NEWS-BULLETINS							
GOVERNMENT:ACTS LEGISLATION							
LEGAL SERVICES							
OASI-OASDI							
WELFARE-OAA-MA							
INCOME-FINANCE							
LISTINGS-DIR. Clbs. Ctrs. COA							
DATA-GEN. NEEDS STATISTICS							
HEALTH-MEDICAL (MEDICARE)							
VOLUNTEERS							
HM. CARE SERV.							
CONF.-MEETINGS							
TAXES: MEALS-PROPERTY							
OTHER CONTACTS: NAMES OF PEOPLE AGENCIES, ORG, CONSULTATION ADDRESSES, ETC.							

SOURCE OF INQUIRY (PROFILE)

LIST OF CATEGORICAL CODE FOR THE RECORDING OF
I & R CONTACTS

ALPHABETICAL
CODE

A-1 ---- AGING GENERAL (Needs and Problems)
(ACTIVITIES SEE "R" RECREATION)

B-1 ---- BIBLIOGRAPHIES, PUBLICATIONS, LITERATURE (GENERAL)

C-1 ---- COUNSELING (GENERAL) *INCLUDING COMPLAINTS*

D-1 ---- DIRECTORIES (LISTINGS-RESOURCES)
D-2 ---- DISCOUNTS (REDUCED RATES)

E-1 ---- EOEA (EXECUTIVE OFFICE OF ELDER AFFAIRS)
(FUNCTION, PURPOSE, STATE PLAN, ANNUAL REPORT)
E-2 ---- EMPLOYMENT (JOB PLACEMENT PROGRAMS)
E-3 ---- EDUCATION (GENERAL)

F-1 ---- FOOD STAMPS (SURPLUS FOOD COMMODITY)
F-2 ---- FRIENDLY VISITORS AND/OR ESCORT SERVICES
F-3 ---- FINANCES (LIMITED, FIXED, CRISIS) *F-4 C.S.*
F-4 ---- *FILMS*
G-1 ---- GOVERNMENT (LEGISLATION, PUBLIC ORGAN., ETC.)

H-1 ---- HOMECARE SERVICES
H-2 ---- HOUSING (GENERAL)
H-3 ---- HOMEMAKER-HOME HEALTH AIDE

I-1 ---- INCOME - GENERAL (HARDSHIP)

L-1 ---- LEGAL SERVICES AND/OR SITUATION

M-1 ---- MEDICARE MEDICAID-MEDEX (MEDICAL ASSISTANCE GENERAL)
M-2 ---- MENTAL HEALTH
M-3 ---- MEDICAL

O-1 ---- ORGANIZATIONS, CLUBS, CENTERS, COUNCILS

N-1 ---- NUTRITION PROGRAM (MEALS-ON-WHEELS, HOT LUNCH)
N-2 ---- *NURSING HOMES (Level 1, 2, 3, 4, etc.)*
P-1 ---- PROGRAMS-BENEFITS-SERVICES (GENERAL)

R-1 ---- RECREATION-LEISURE TIME ACTIVITIES
R-2 ---- RETIREMENT-PLANNING-PENSION (GENERAL)

S-1 ---- SOCIAL SECURITY ADMINISTRATION
S-2 ---- STATISTICS (GENERAL DATA) *SURVEYS*

T-1 ---- TRANSPORTATION PROGRAM-SERVICES (GENERAL)
T-2 ---- TRAINING (GENERAL)
T-3 ---- TAXES (REBATE, ETC.)

W-1 ---- WELFARE (OAA), SUPPLEMENTAL SECURITY INCOME (SSI)

EOEA

INFORMATION AND REFERRAL RECORD OF DAILY CONTACTS

DATE:

DATE	NAME-ADDRESS	CATEGORY CODE	TYPE OF CONTACT				TYPE OF CLIENT				DISPOSITION		
			TEL	MAIL	OFFICE	FLD.	AGED	ORGAN GROUP	STUDENT		Q-ANS.	VERBI MAIL	
										YES	NO		

(PROFILE)

RECORD CHART OF MONTHLY INQUIRIES

MONTH: JAN 1974

CATEGORIES NUMBERS OF INQUIRIES

Category	5	10	15	20	30	40	50	60	70	80	90	100	
RE: NEEDS-PROBLEMS													
GEN. LITERATURE													33
COUNSELING GENERAL													7
RESOURCE-LISTINGS													3
REDUCED RATES													2
AREA FUNCTION													2
EMPLOYMENT													3
EDUCATION													1
FOOD-COMMODITY													0
FRIENDLY VISITORS													0
FINANCES													0
FILMS													4
LEGISLATIVE													2
HOME CARE													4
HOSPITAL													20
HOUSING													4
INCOME													3
LEGAL													3
MEDICARE-MEDICAID													9
MENTAL HEALTH													0
MEDICAL													2
ORGANIZATIONS, CLUBS, ETC.													2
NUTRITION - MEALS													9
NURSING HM. LEV. 1-4													4
PROGRAMS-SERVICES													22
REC.-LEISURE TIME ACTIVITIES													1
RETIREMENT-PLANNING-PENSION													2
SOCIAL SECURITY													1
STATISTICS-DATA-SURVEYS													3
TRANSPORTATION													2
TRAINING													1
TAXES-REBATE													2
WELFARE													11

total 164

Nutrition Project	Project Area
Highland Valley Elder Service Center 58 Pleasant Street Northampton, MA 01060 (413) 586-3130	Easthampton, Hadley, Northampton
Lawrence Regional Vocational High School River Road Andover, MA 01810 (617) 686-1422	Amesbury, Merrimack, Haverhill, Lawrence, Methuen, Billerica, Dracut, Tewksbury, Lowell, Newburyport
Lynn Council on Aging 75 Union Street Lynn, MA 01901 (617) 599-0110	Lynn, Nahant, Saugus, Lynnfield
Mystic Valley Home Care, Inc. 341A Forest Street Malden, MA 02148 (617) 324-1200	Malden, Medford, Everett, Melrose
Montachusett Opportunity Council 305 Whitney Street Leominster, MA 01453 (617) 537-9126	Fitchburg, Gardner, Leominster, Ashburnham, Westminster, Templeton, Winchendon
City of New Bedford Elderly Nutrition Program 725 Pleasant Street P. O. Box F-658 New Bedford, MA 02742 (617) 999-2931 X-305	New Bedford, Dartmouth, Acushnet, Fairhaven, Rochester, Marion, Mattapoisett
Old Colony Elderly Services, Inc. 170 Main Street Brockton, MA 02401 (617) 584-1561	Brockton
Peabody Council on Aging 96 Main Street Peabody, MA 01960 (617) 531-2254	Peabody, Salem
Roxbury Council of Elders 55 Dimock Street Roxbury, MA 02119 (617) 445-5420	Allston, Brighton, Fenway, Back Bay, South End, Roxbury, N. Dorchester, N. Jamaica Plain